State of Illinois

Small Purchase

#10 V.1.1

Table of Contents

The information contained in this document is a general guideline for the processing of procurements using the State of Illinois BidBuy system. State of Illinois procurements must be conducted in accordance with applicable statutes and rules, including the Illinois Procurement Code. For any questions, please contact your Agency Procurement Officer (APO) or State Procurement Officer (SPO).

BidBuy General Overview

General Overview

User Roles

Department Access (DA)*

Department Access is the role for Agency requestors or end-users. Department Access gives users the ability to be a requisitioner or contract shopper.

A requisitioner is a user who creates Requisitions from scratch, while a contract shopper is able to order from existing blanket contracts only.

Basic Purchaser (BP)*

Basic Purchaser (BP) is the role for Agency purchasing staffs and APOs.

Basic Purchasers can create all documents on the Agency side such as Requisitions, Bid, Purchase Orders and their related documents such as Amendments, Change Orders and revisions.

* An approver may be configured as either a Department Access or Basic Purchaser. In addition, if a user's role is to approve only, they may be setup as a Department Access role with approval rights only, disallowing both requisitioning or contract shopping.

General Document Structure

	Requisition Types: Open Market, Release & Demand	Bid New Public Procurement Bulletin	Purchase Order Types: Purchase Order & Master Blanket
Document Numbering	17-416CMS-BOSS4-R-101	17-416CMS-BOSS4-B-87	17-416CMS-BOSS4-P-200
	Fiscal Year - Organization ID - Department ID - Document Letter - Record Number*		
Document Description	Requisitions are documents that Agencies use to request goods or services. In addition to Agency approvals, CMS Bureau of Strategic Sourcing and the Governor's Office of Management and Budget will provide approval on the Requisition.	A Bid allows you to publish a request for goods and services in BidBuy, and have registered vendors login, view and ultimately quote on those bids. BidBuy can help you to choose the best quote, award the Bid (Bid Tab**) and convert the Bid to a Purchase Order/Contract.	Purchase Orders are used to purchase goods or services. In addition, they communicate details about the purchase both to the public, vendor(s) and the State that need to know about the purchase (i.e. accounting, requestor). Contract amendments may be applied to Purchase Orders via Change Orders.
Legacy System	Procurement Business Case (Remedy), IGPS, Surveys, Procurement File	Illinois Procurement Bulletin for General Services, Procurement File	IGPS, Procurement File

*Record Numbers are generated based on a number wheel exclusive to each of the 3 documents. (i.e. Req, Bid, PO) As a result, a Requisition's record number may be 300, while the associated Purchase Order is 102.

** The Bid Tab is a sub-document of the Bid where Vendor Quotes are tabulated, and where an award is recorded.

Remember! Use the symbol to quickly and easily search for any document available to you.

Terms Crosswalk

Current	Future
Solicitation/Notice	Bid
IPB Registered User	Bidders
Addendum	Amendment
Bid/Offer/Response	Quote
Award Information	Bid Tab
Contract	Purchase Order (PO)
Amendment	Change Order

General Process Workflows

Included below is a high level walkthrough of the most common BidBuy process workflows.

- Each process step affords the opportunity for approvals to occur based on identified criteria, including Agency department, location, procurement amount, NIGP codes, user role and accounting.

Small Purchase – Begins with an Open Market Requisition, then converted to a Purchase Order.

Requisition → Bid ($10,000 to Formal Solicitation Threshold) → Purchase Order

Competitive Solicitation – Begins with an Open Market Requisition, which is converted to a Bid for public solicitation. Once quotes are obtained, the Bid Tab is opened and vendor is awarded. The Bid Tab is then converted to a Purchase Order.

Requisition → Bid → Bid Tab → Purchase Order

Release (Order Against Contract) – Begins with a Release Requisition, then converted to a Purchase Order.

Release Requisition → Purchase Order

Renewal – Begins with an Open Market Requisition referring to the associated Purchase Order/Contact. The Requisition is converted to a Bid and the Bid Tab is completed with the renewal amount(s). Finally, a Change Order is created against the original Purchase Order/Contract for the Renewal terms.

Requisition → Bid → Bid Tab PO Change Order

Change Order – Begins with an Open Market Requisition referring to the associated Purchase Order/Contact. The Requisition is converted to a Bid and the Bid Tab is completed with the change order amount(s). Finally, a Change Order is created against the original Purchase Order/Contract based on the Change Order terms.

Requisition → Bid → Bid Tab PO Change Order

Overview & Outcomes

The State requires purchases and procurements that meet the following criteria to be processed using BidBuy:

- All purchase orders against masters
- All purchases where soliciting vendors
- Everything else > $2K

Small Purchases are procurements that are less than the determined threshold limits for the specific goods or services. Annually, these thresholds are subject to change. Small Purchases $10,000 and greater will require processing a Bid, Quote and Bid Tabulation in BidBuy. Small Purchases less than $10,000, the agency may choose to follow the use the Informal Quote on the Requisition or the formal Bid process in BidBuy.

One-time **Professional & Artistic (P&A) Services** less than the specified dollar amount are considered a small purchase, however, all P&A purchases will be processed via the Request For Proposal (RFP) method due to the requirement to publicize the award to a vendor of a P&A service.

Learning objectives and modules:

For Small Purchases, both a Requisition document with an informal quote or Bid, Quote and Bid Tabulation and a Purchase Order document are used.

- ***Requisition:*** An Open Market requisition is the entry point into the process of making a small purchase in the system. The Requisition document allows Department Access (DA) or Basic Purchasing (BP) users to complete the following activities:
    - Perform searches for vendors in the Small Business Set Aside Program
    - Solicit informal pricing from selected vendors (the informal pricing feature on the requisition)
    - Review and tabulate price quotes received
    - Research and select additional vendors if initial quotes are not adequate
    - Attach a waiver, if needed
    - Submit a satisfactory response for approval
    - Convert directly to the purchase order

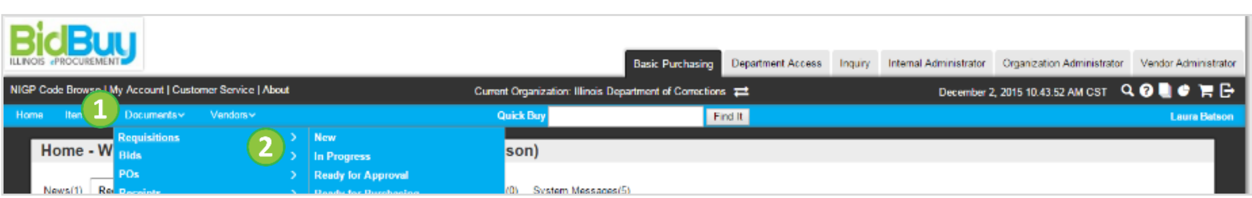
- ***Purchase Order:*** Purchase Orders (PO) originates from an approved Requisition or Bid. Information from approved Requisitions or Bids can be modified, added to, or removed from the In-Progress PO. The information can be updated and added to on the resulting Purchase Order. Upon completion of creating a Purchase Order the user submits the Purchase Order for approval. After approval, the Purchase Order can be sent to the Vendor.

Create Open Market Requisition

The Open Market Requisition is a request for goods and services and is the starting point for the Small Purchase procurement method. A Requisition is the entry point into the system that requires the justification of need and funding source. In addition, it allows for solicitation of informal price quotes that the vendor, the DA or the BP user may enter.

From the BidBuy Home screen:

1. Click **Documents** from the Blue Ribbon
2. Select **Requisitions** and then **New**



Complete Tabs

Documents arrange data in a tab structure. The following sections guide the user through each tab.

General Tab

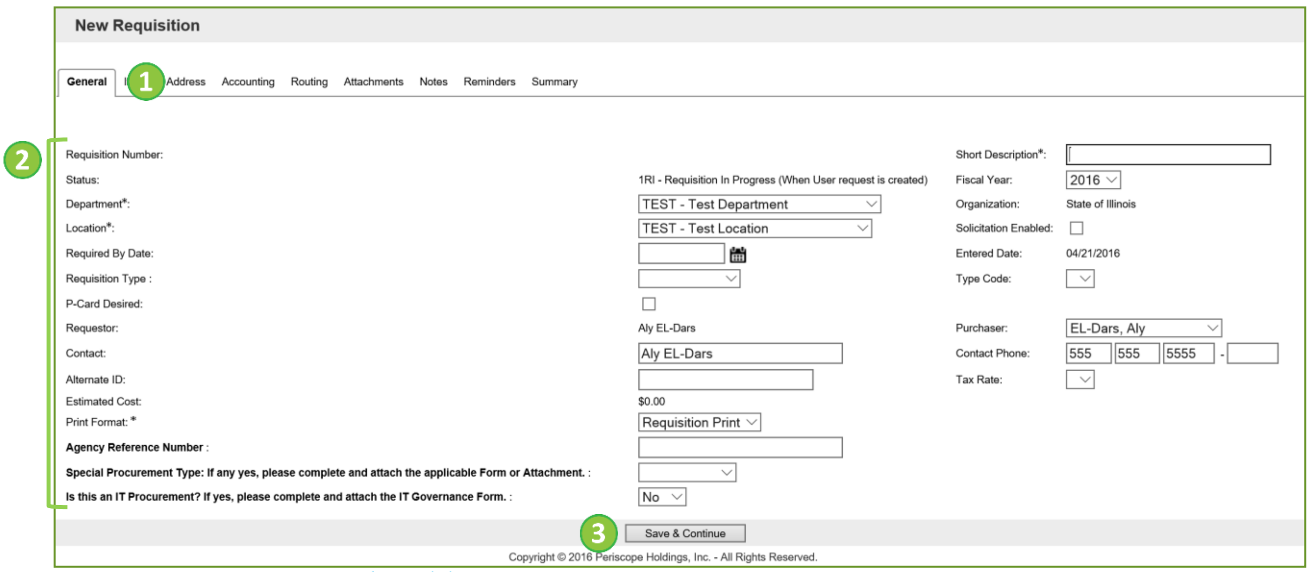
On a Requisition, as in most documents in BidBuy, the General tab is completed first.

Once the required information on the General tab is entered and saved, a Requisition number will be automatically assigned and the user can navigate to other tabs.

1. Fill in all required information on the **General** tab
2. Enter general information

> **Requisition Type should be Open Market. Fields with an Asterisk * are required.**

3. Click **Save & Continue** to save information



Requisition General Field Descriptions

Field Name	Description
Requisition Number	The requisition ID number. This number is automatically generated when the user selects Save & Continue.
Short Description*	Enter a short description to help identify the requisition. Use complete words, not abbreviations. Start with alpha agency identifier, and then describe the item to be procured. Use noun, adjectives.
Status	The current status of the requisition. The initial status is set to 1RI – Requisition In Progress. The status will change automatically as the requisition is processed.
Fiscal Year	The fiscal year associated with the requisition. This is only for current fiscal year.
Department*	Using the dropdown menu, select the department this requisition is for if the default department displayed is not correct.
Organization	Organization is equivalent to your agency. The organization of the department that the requisition is for.
Location*	Using the dropdown menu, select the location this requisition is for, if the default location is not desired.

Solicitation Enabled	Not used by the State at this time.
Required By Date	Enter the date the items on this requisition is required or use the calendar icon to select the date.
Entered Date	The date the requisition is created. This field is automatically generated and cannot be edited.
Requisition Type	Using the dropdown menu, select the requisition type – select **Open Market**. Sole Source, Small Purchase, Emergency, etc. originate as an Open Market Requisition, if items are not on a master blanket.
Type Code	Using the dropdown menu, select the Type Code. The Type Code is administrator-defined and maintained in BidBuy. This will not populate until the requisition type is selected. Types are: 1. Commodities 2. Employee Benefits 3. Equipment 4. Facilities 5. General Services 6. Health & Medical Services 7. Information Technology 8. Pharmaceuticals 9. Telecom 10. Artistic or Musical Services (Exempt) 11. Construction or Construction Related Services
Requestor	The name of the user who created the Requisition. The user cannot edit this information.
Purchaser	Using the dropdown menu, select the purchaser for the requisition if there is no default or the default is not desired.
P-Card Desired	State is not using P-card features.
Contact	Enter the contact person's name for the requisition.
Contact Phone	Enter the contact person's phone number for the requisition.
Alternate ID	Not used by the State
Tax Rate	Not used by the State.
Estimated Cost	The estimated cost for the requisition. This field is calculated by BidBuy and cannot be modified by the user.
Print Format*	The print format used for print of the requisition.
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

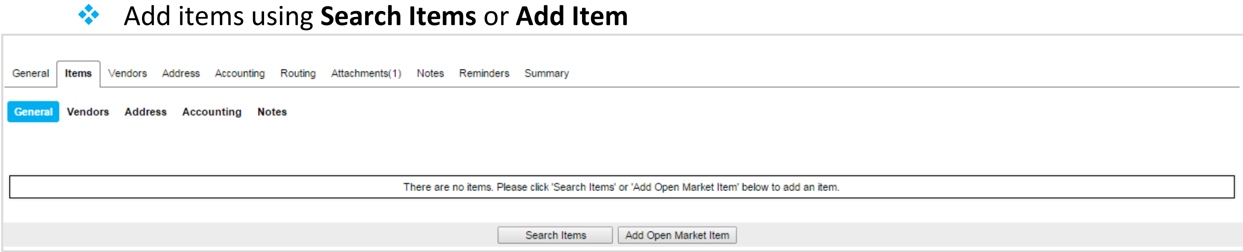
Items Tab

Enter items into the Requisition by selecting either **Search Items** or **Add Open Market Items.** The user would **Search Item** if it is known the item was purchased in the BidBuy system in the past. If not, the user would **Add Open Market Items** and create from scratch.

Items Tab: General

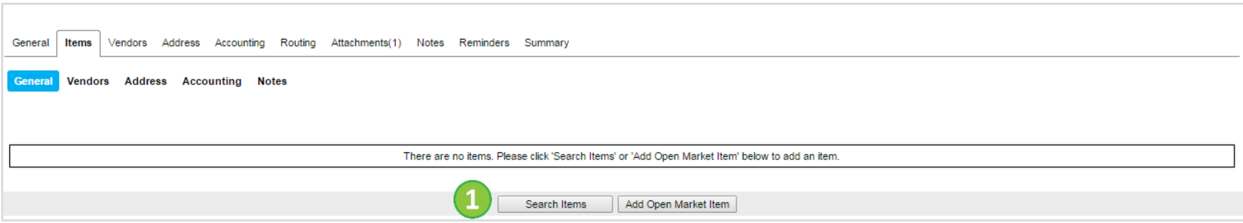
The items tab, general subtab contains the item information. Each additional subtab contains additional information that can be associated to specific items.

- Select **General** sub-tab
- Add items using **Search Items** or **Add Item**

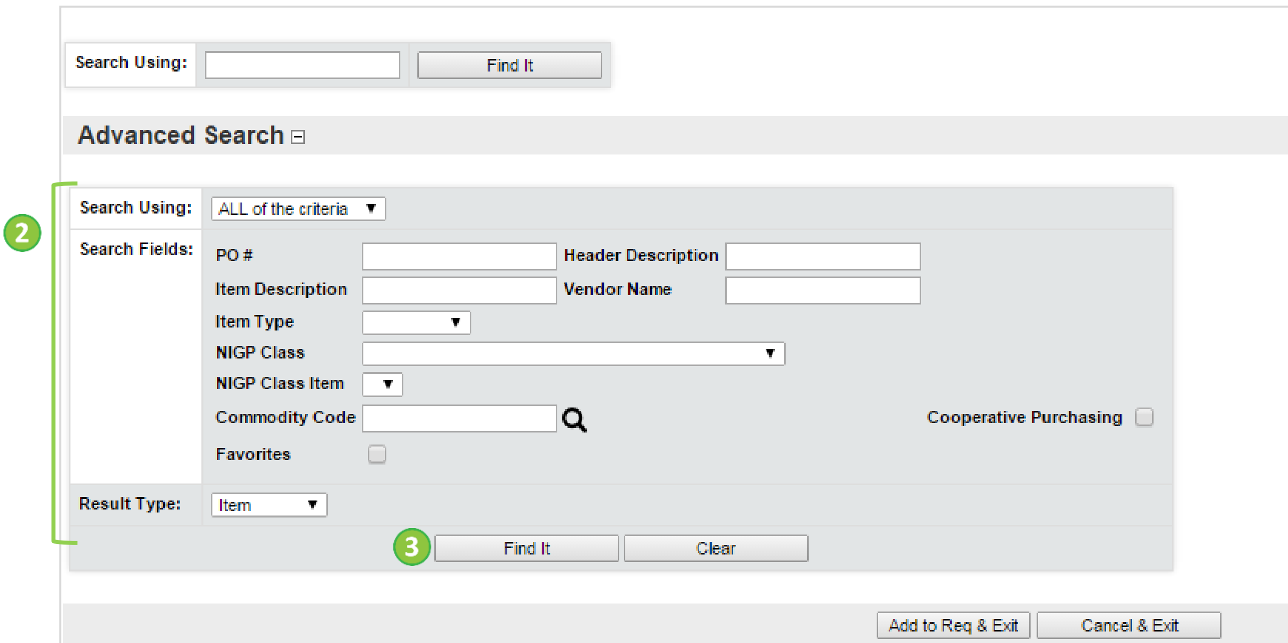


Add Items to Requisition using Search Items

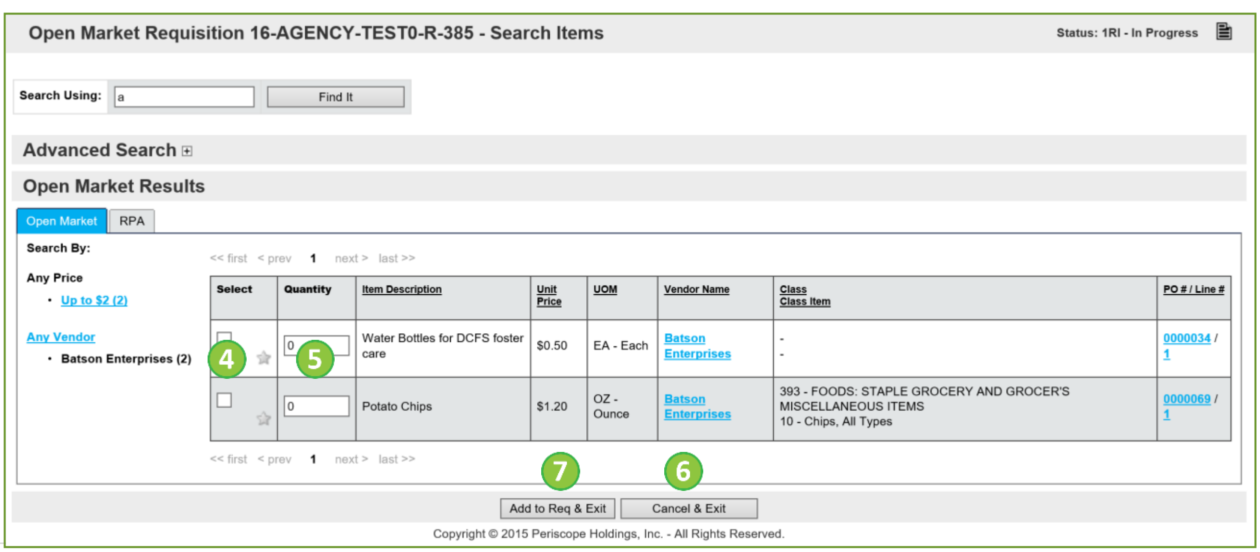
1. Click **Search Items**



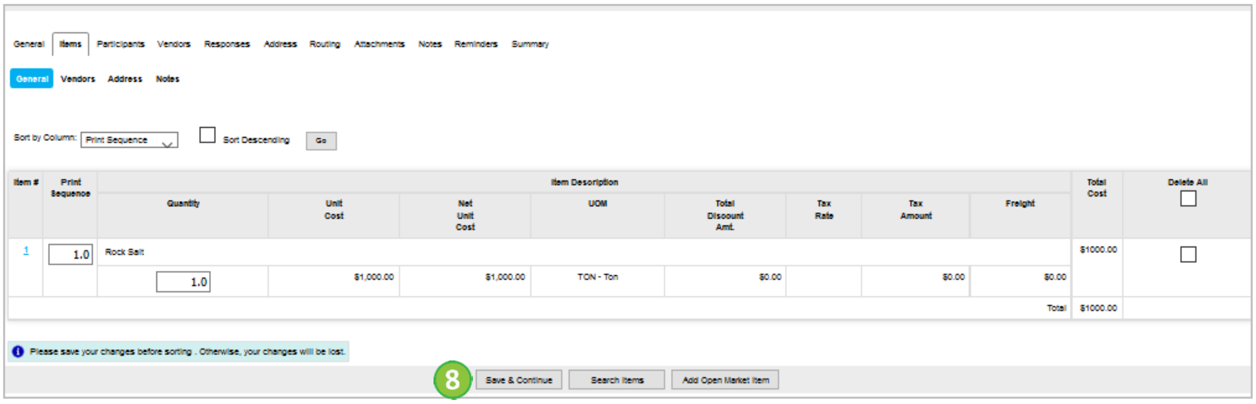
2. Enter search criteria in screen below
3. Click **Find It**



4. Select item to add
5. Enter a value for **Quantity**
6. Click **Cancel & Exit** to cancel selections
7. Click **Add to Req & Exit** to save items to the Requisition



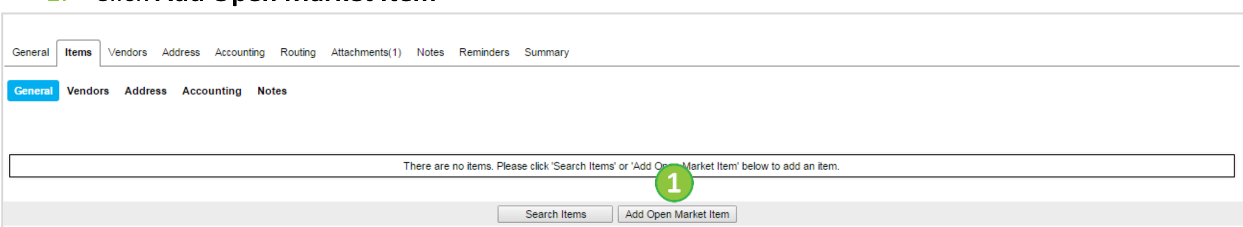
8. Click **Save & Continue** to save changes



Add an Open Market Item

An Open Market Item is an item created from scratch. Creating an item with quantity and unit cost generate an estimated total cost.

1. Click **Add Open Market Item**

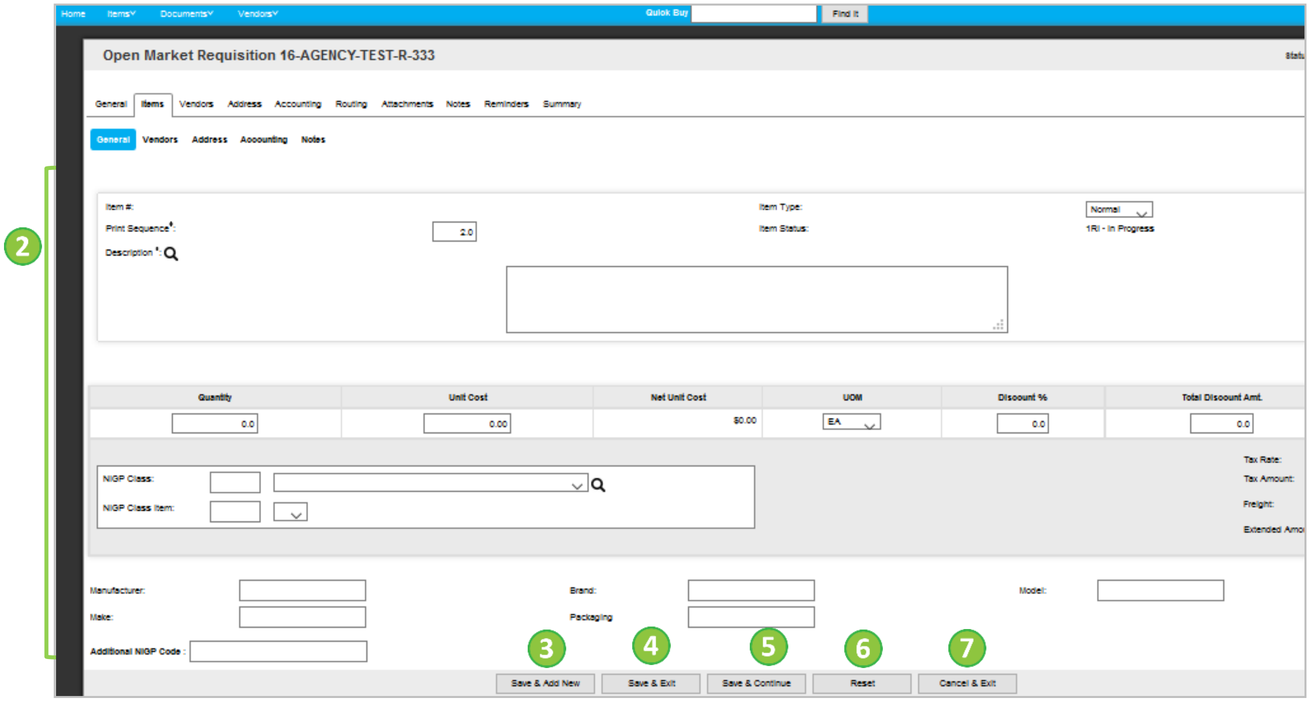


2. Enter item information

> See Requisition General Field Descriptions Table. All fields with an Asterisk * are required.

3. Click **Save & Add New** to save item and create another new item
4. Click **Save & Exit** to save item to Requisition and return to Requisition screen (can add additional items later)
5. Click **Save & Continue** to save with option to continue entering this item's details
6. Click **Reset** to clear all fields

7. Click **Cancel & Exit** to end the process for creating an item



Requisition Item Field Descriptions

Field Name	Description
Item #	The order in which items are entered and are sequentially listed by BidBuy. This field cannot be modified by the user.
Print Sequence*	The order in which the items will be displayed. The item # is the default value for this field. The user can change this field if the print sequence needs to be different from the item number sequence.
Item Type	The user can select *Normal* or *Narrative* as the type. Selecting *Narrative* will make it a non-item addition where the user can type in text to appear on the purchase order.
Item Status	The status of the item on the Requisition. Status is "In Process" at this point
Description*	The description of the item as defined by the user. Use complete words, not abbreviations. Start with NIGP description, then add more detailed information. NOTE: This is a searchable field for blanket contracts using Quick Buy. Use a searchable description and include any keywords that might assist future buyers.
Quantity	The Quantity of the item being requested. The user can type the amount of the item that is needed. The default value is zero.
Unit Cost	An estimated unit cost per item.
Net Unit Cost	Net unit cost per item is the Unit Cost – Discount % amount for unit cost.
UOM	User selects a unit of measure from the drop-down menu. **Reference Appendix A: Unit of Measure Descriptions, page 80**
Discount %	Used if there is a percentage discount applicable to the item.
Total Discount Amt.	The Total Discount Amount, based on the Discount %. This value is calculated automatically by the system based on the Discount % value

Field Name	Description
	entered by the user. The value will not appear until the user tabs out of the Discount % field. The user can also manually type in a discount amount without entering a Discount %. The value must be negative for it to be deducted from the total.
Total	The Total Cost before tax. This value is calculated automatically. The formula used is: (Quantity x Unit Cost) – Total Discount Amount. The user cannot edit this field.
NIGP Class*	The three-digit Class Code associated with the item. Class Codes are listed on the pulldown menu in alphabetical order or through the search feature.
NIGP Class Item*	The two-digit Class Item associated with the item. Class items are listed on the pulldown menu in alphabetical order or through the search feature.
Commodity Code	Completes the full 11-digit NIGP code
Tax Rate	The State is not using Tax Rate.
Tax Amount	The State is not using Tax Amount.
Freight	The amount of Freight applied to this item.
Extended Amount	The Total Extended Amount of the item. This value is calculated automatically. The formula used is: Total + Tax Amount + Freight. The user cannot edit this field.
Manufacturer	Optional field.
Brand	Optional field.
Model	Optional field.
Make	Optional field.
Packaging	Optional field.
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

No remaining sub-tabs for Items are completed until the additional main tabs are complete. These Item sub-tabs are only used to assign different Vendors, Address and Account Codes to specific items.

Items Tab: Vendor

This vendor section allows the user to add a vendor to specific items. To add a vendor to all items, go the main Vendors tab for the requisition.

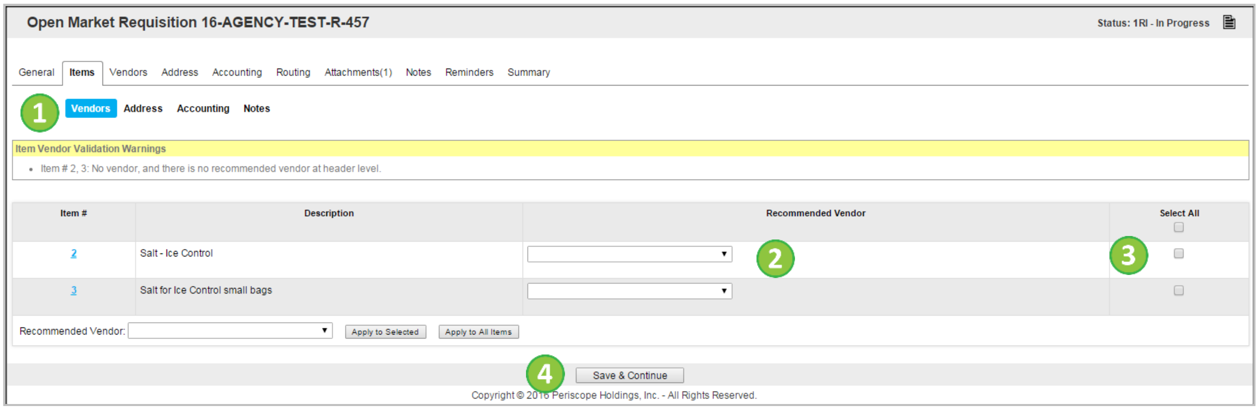
Apply vendor to single item

1. Select **Vendors** sub-tab
2. Select drop-down to assign preferred vendor

Only the vendors added to the main Vendor tab appear in the drop-down.

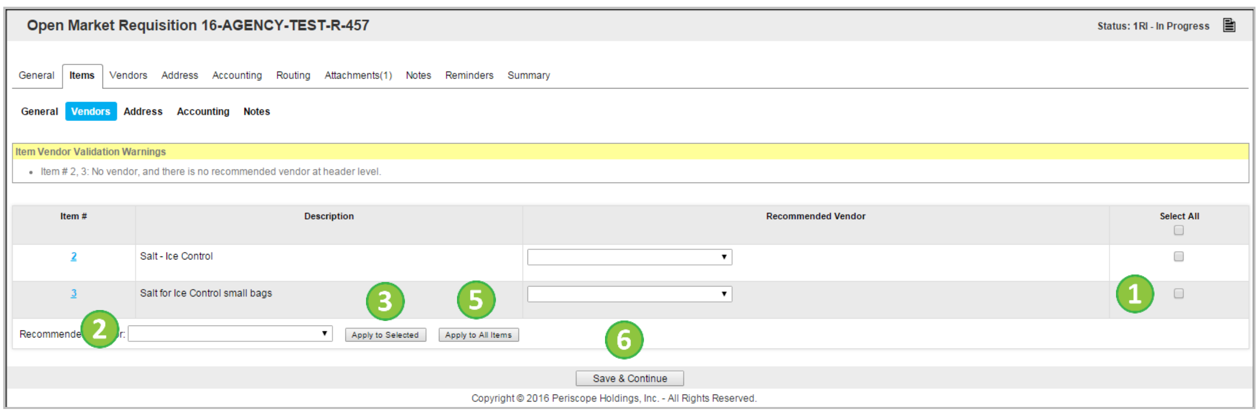
3. Select the item

4. Click **Save & Continue**



Apply multiple items to a vendor

1. Select items to apply to selected vendors
2. Select drop-down to assign preferred vendor
3. Click **Apply to Select Items**
4. Repeat steps 1 & 2 as needed
5. Click **Apply to All Items**
6. Click **Save & Continue**



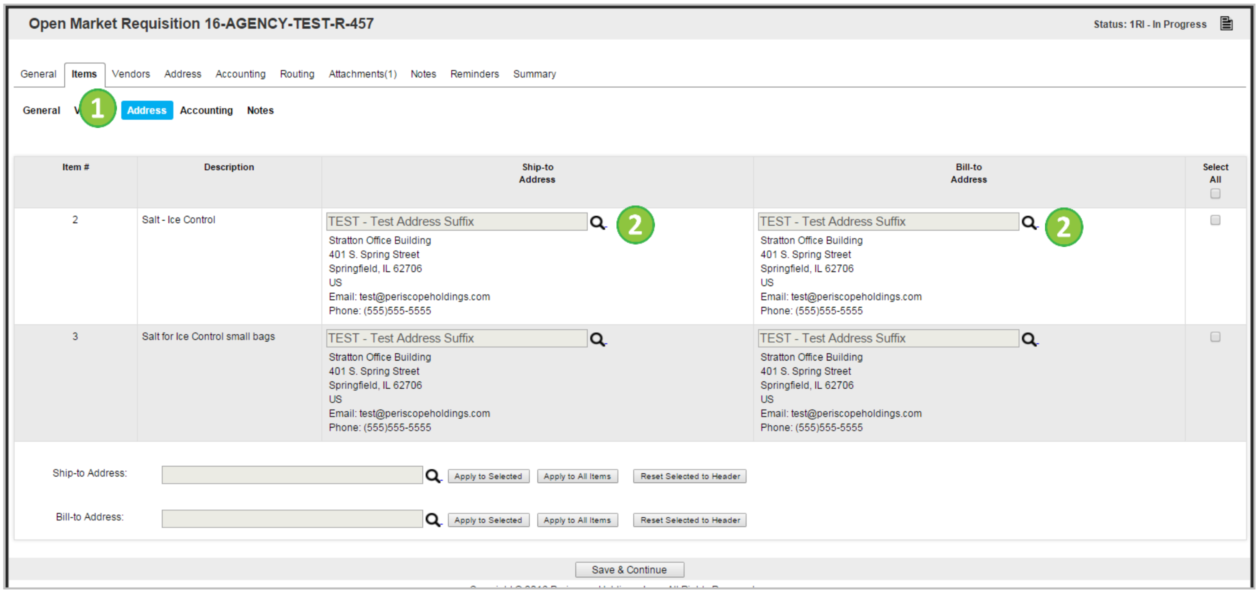
Items Tab: Address

This tab allows the user to select shipping and billing addresses for specific items. To assign shipping and billing addresses for all items go to main Address tab.

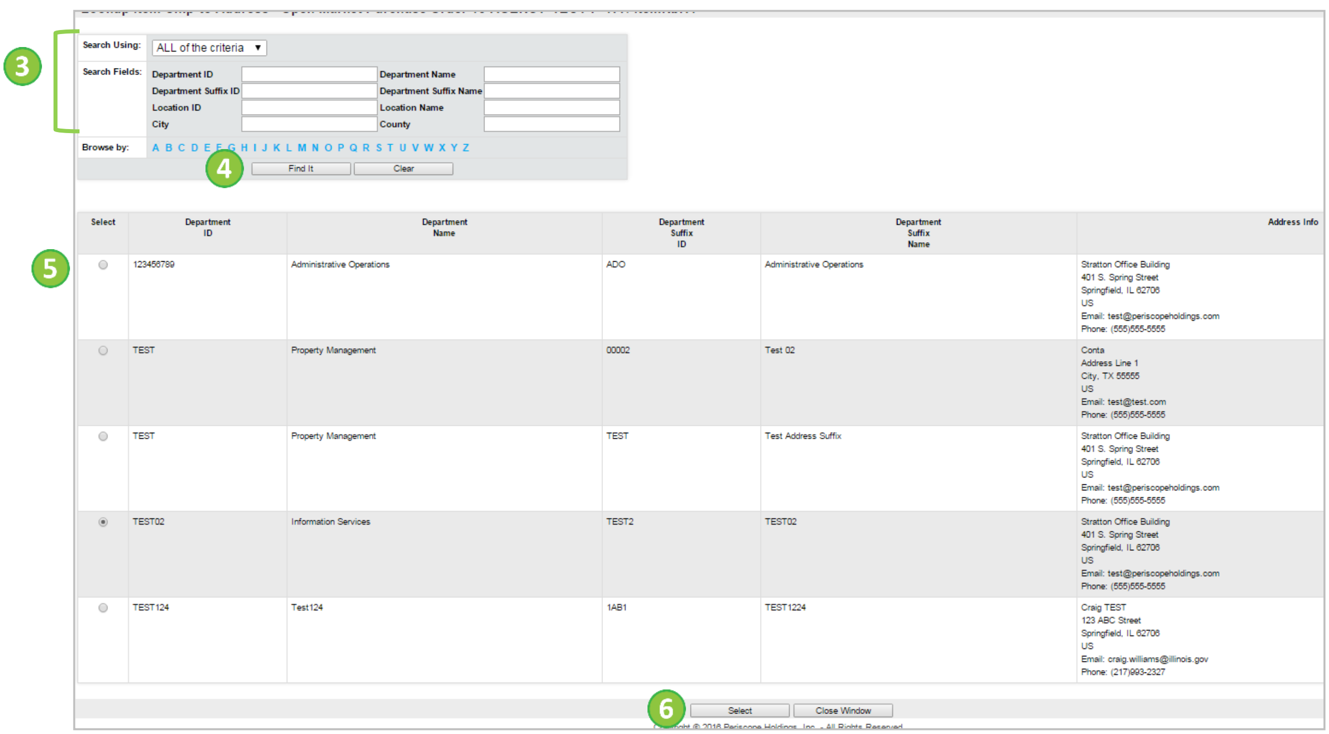
1. Select **Items** tab, then **Address**

Default address information from the item master displays.

2. To change **Ship-to** or **Bill-to-Address**, click to search for new address

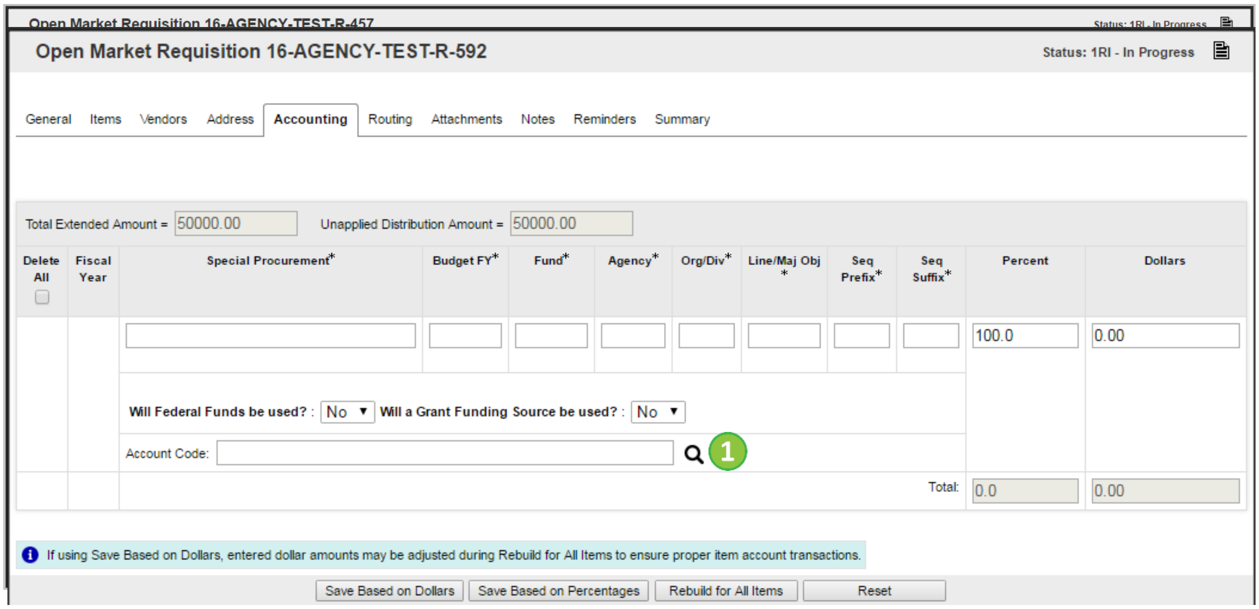


3. Enter **Search Criteria** or browse by letter
4. Click **Find It**
5. Select a new address
6. Click **Select** to update address



7. Select item(s) to change address (Ship/Bill To Address)
8. Click **Apply to Selected** to apply changes to only selected items or click **Apply to All Items** to apply changes to all items
9. Click **Reset Selected to Header** to reset all addresses to default from Address Master

10. Click **Save & Continue** to save changes and continue



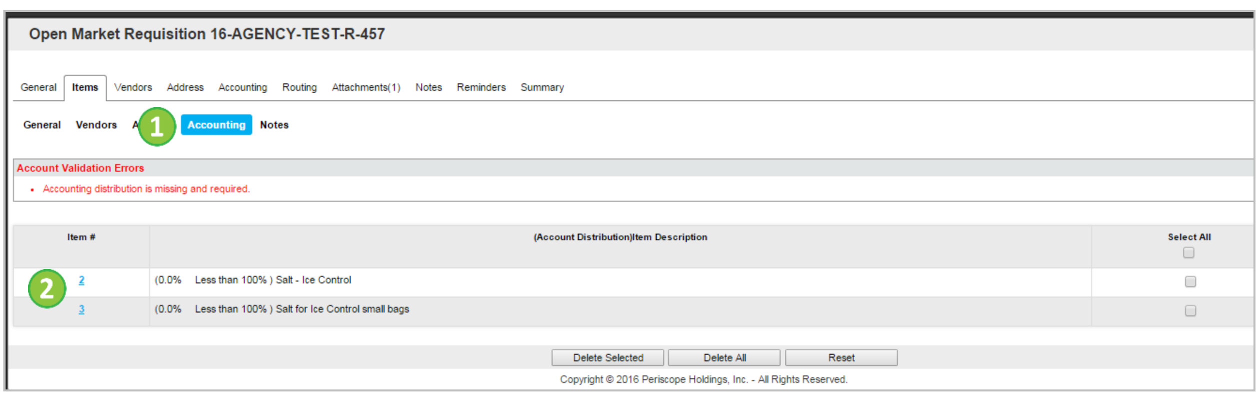
Items Tab: Accounting

The Item's Accounting sub-tab allows the user to enter accounting information for specific items. To add the same accounting information to all items, go to the main Accounting tab for the requisition. Accounting information that is entered on the Requisition is carried over to the converted PO and is mandatory. The Requisition will not proceed to approvals unless this tab is filled correctly.

1. Select **Accounting** sub-tab

> **Accounting defaults based on user defaults or if the main Accounting tab was populated.**

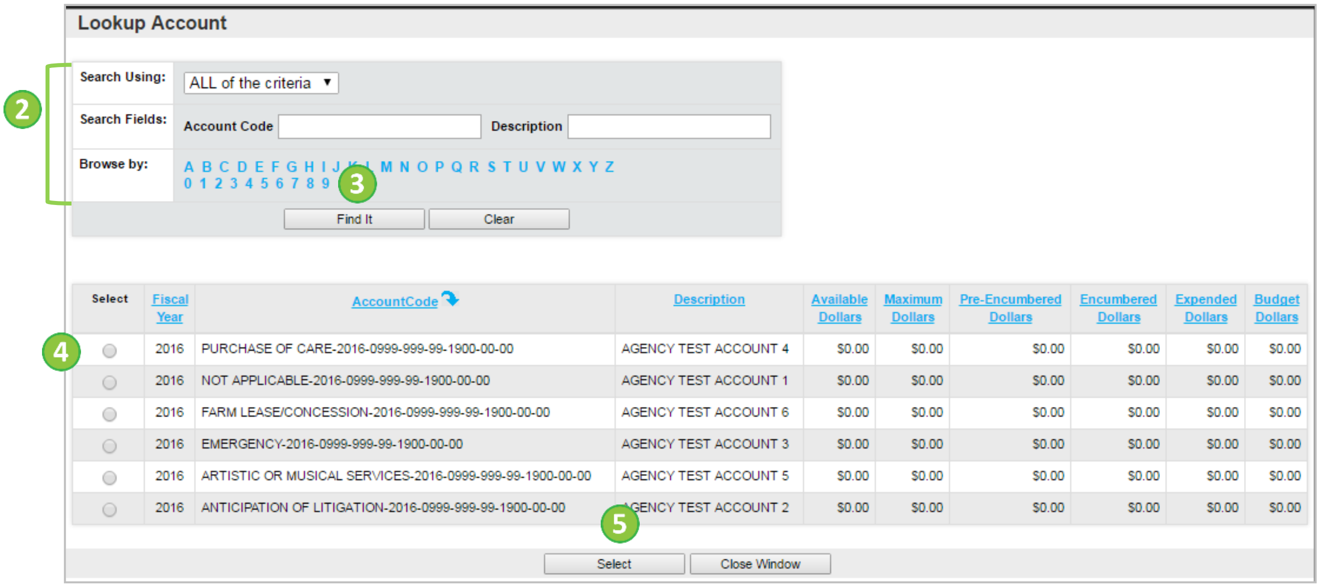
2. Select **Item #** to update accounting information



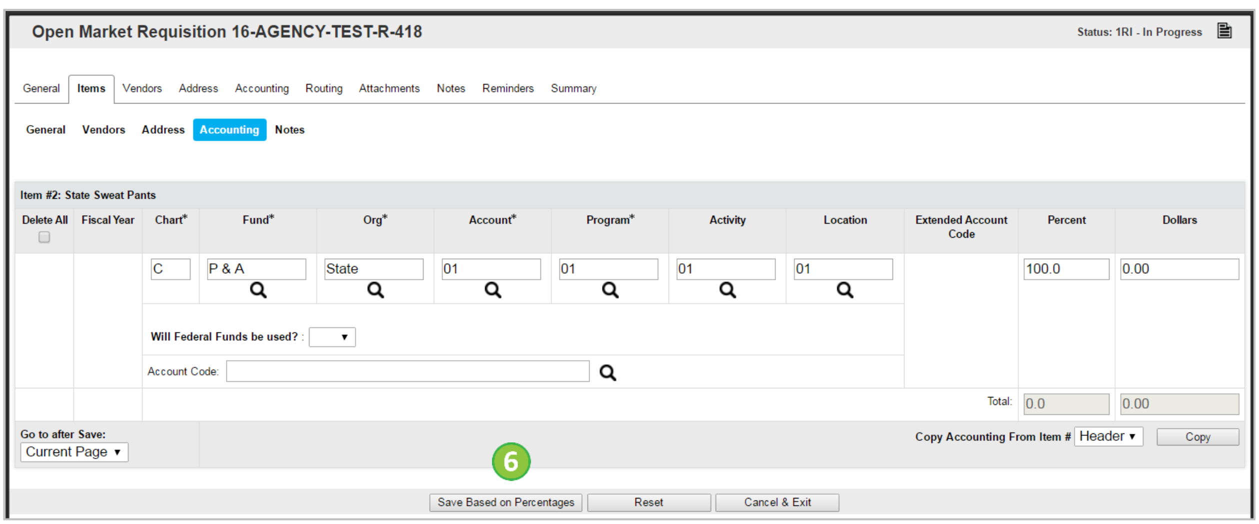
Add Account Code

1. Click 🔍 to search for **Account Code**
2. Enter search criteria or Browse by: letter
3. Click **Find It**
4. Select Account Code

5. Click **Select**



6. Click **Save Based on Percentage** – to save based on dollar amount entered or click **Save Based on Dollars** – to save based on a percentage

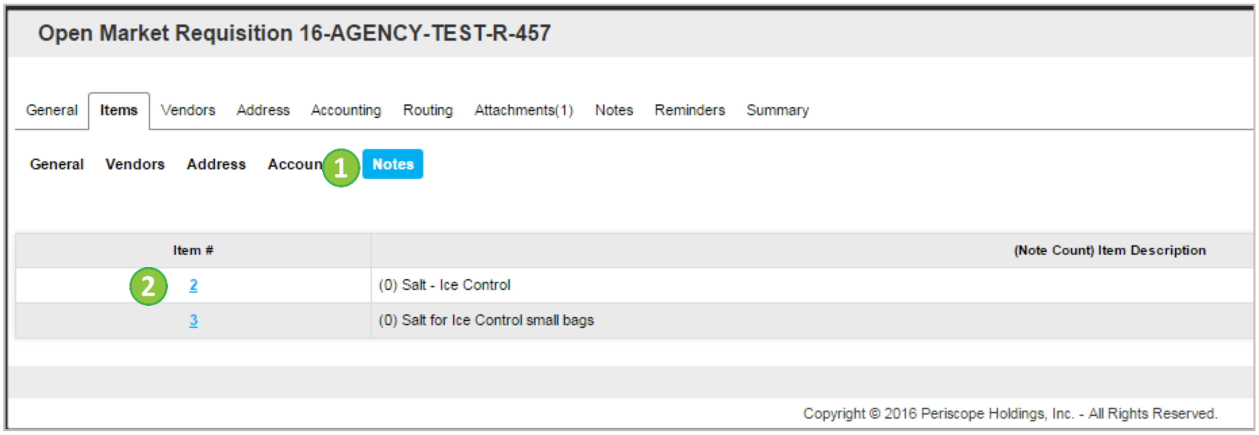


Items Tab: Notes

This notes section allows the user to add notes to specific items. To add notes to all items, go the main Notes tab for the requisition.

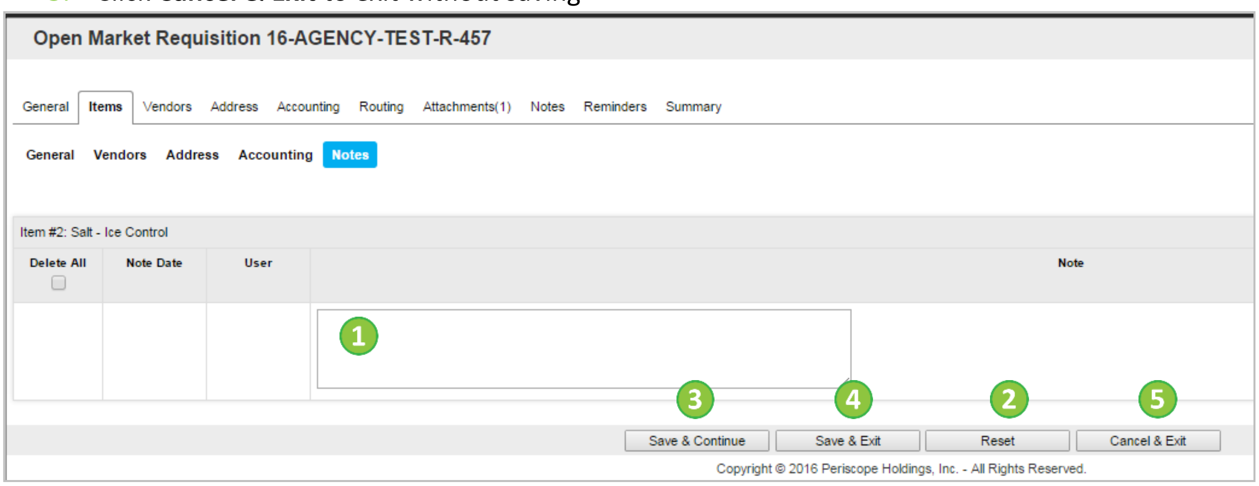
1. Select **Notes** sub-tab

2. Click **Item #** to add notes to that item



Create Item Notes

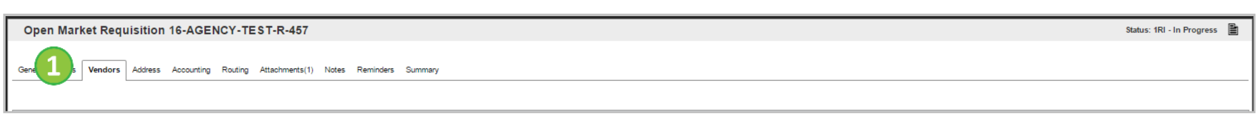
1. Enter notes content
2. Click **Reset** to reset screen display before saving
3. Click **Save & Continue** to save notes and continue adding more notes
4. Click **Save & Exit** to add note and exit to Requisition
5. Click **Cancel & Exit** to exit without saving



Vendor Tab

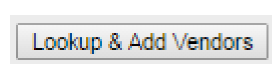
The vendor tab allows users to lookup vendors, record informal quotes from vendors, recommend vendors and delete vendors.

1. Select **Vendor** tab

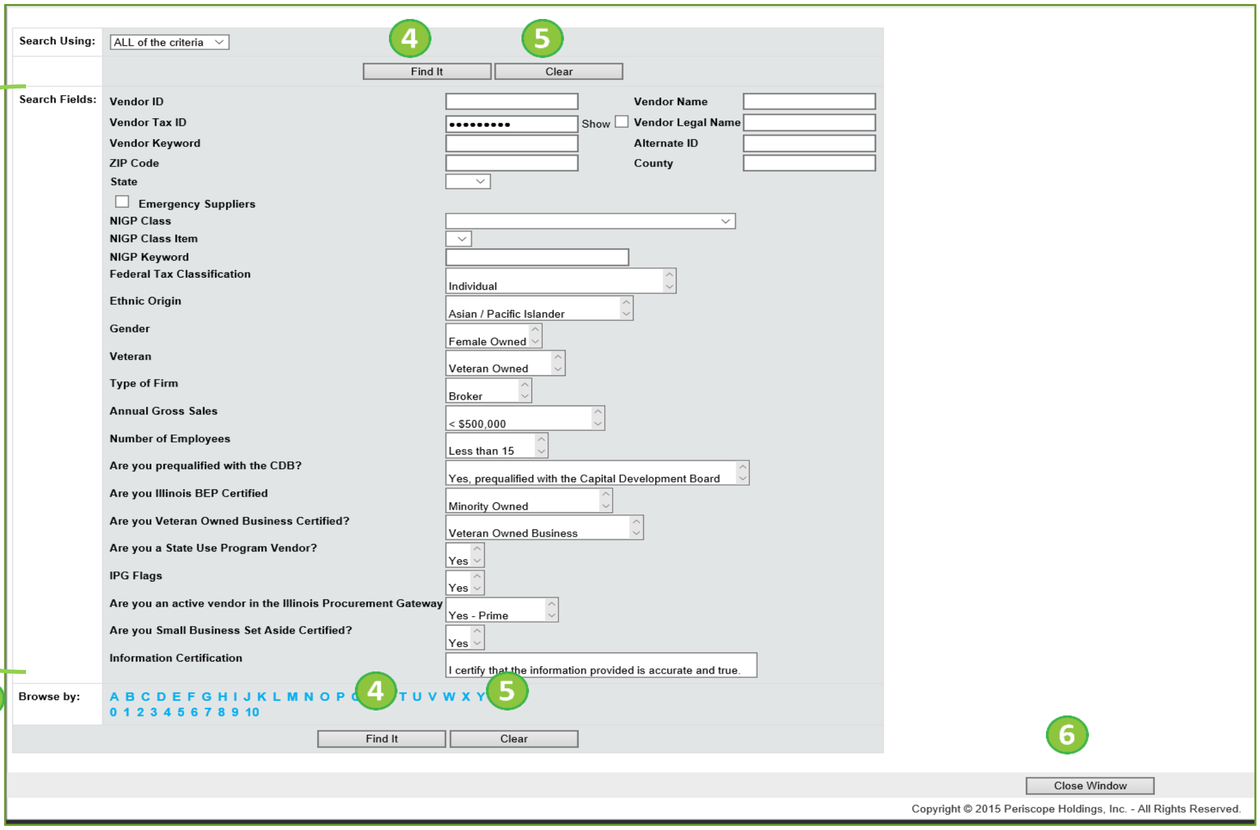


Look up vendors

1. Click **Lookup & Add Vendors** at the bottom of the Vendor tab page
2. Enter search criteria
3. To browse use **Browse By** and click on letter or numeric entry
4. Click **Find It**



5. Click **Clear** to restart search from scratch
6. Click **Close Window** to return to previous screen



7. Select radio button next to **Vendor ID**
8. Click **Add Vendor**

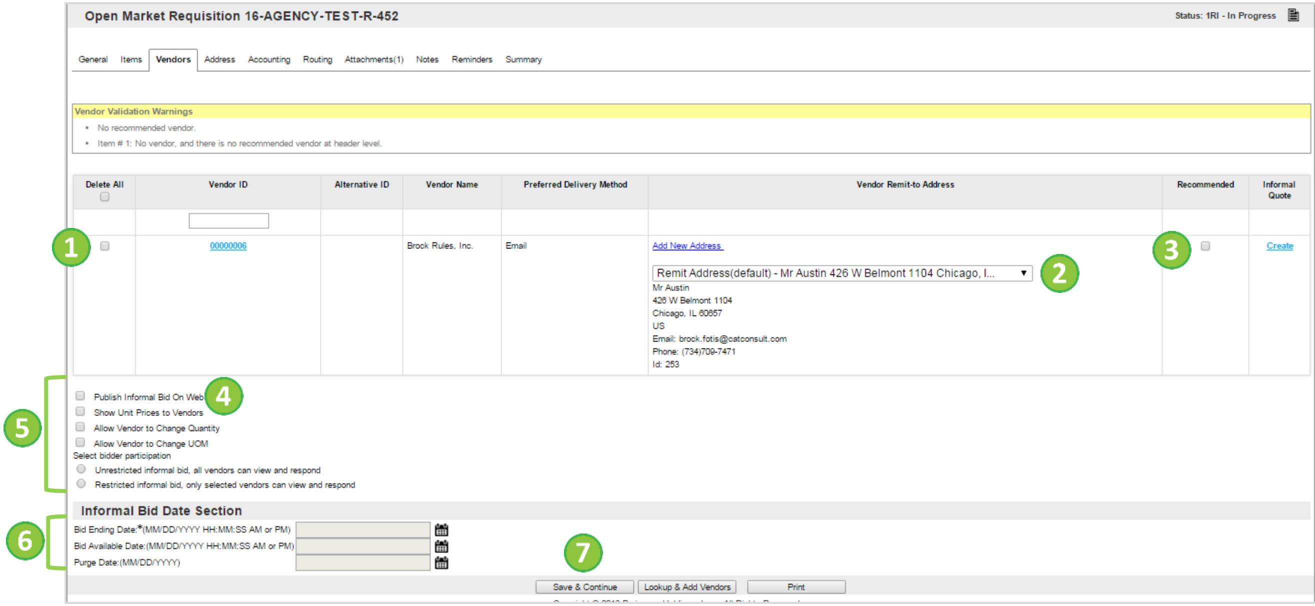
Update vendor setting

1. Select **Delete** button to delete vendor
2. Select drop-down to select the vendor address
3. Click **Recommended** to indicate the vendor as recommended
4. Select vendor options for Informal Quote

> **See Requisition Vendor Field Description Table. All fields with an asterisk* are required.**

5. **Publish Informal Bid on Web** must be checked in order to enter quotes
6. Enter **Informal Bid Dates**

7. Click **Save & Continue**



Once information is saved, a new option appears to Notify Vendors.

Requisition Vendor Field Descriptions

Field Name	Description
Vendor Remit-to Address	Is default by vendor selection. This can be updated to a different address if that vendor has added additional addresses on their vendor profile.
Recommended	The vendor has been identified as recommend for this requisition. This is an optional step and informs the buyer, on the Purchase Order, that the vendor is recommended by the requestor to supply the goods or services.
Informal Quote	State will use informal quotes for Open Market Small Purchases off a Requisition when applicable.
Publish Informal Bid On Web	Allows the informal quote to be viewed by vendors online. Informal quotes enable requestors to reach out to vendors for pricing and to attach vendor specific information to the requisition. This is not the formal bid process, rather an informal method to obtain quotes from vendors.
Show Unit Prices to Vendors	Passes the item prices from the Requisition item to the vendors on the informal quote.
Allow Vendor to Change Quantity	Allow the vendor to change the quantity of items on the informal quote.
Allow Vendor to Change UOM	Allow vendor to change unit of measure for delivery of PO items. For example: the user wants 12 cases with 12 bottles per case. Vendor has 24 cases with 6 bottles per case. **Reference Appendix A: Unit of Measure Descriptions, page 80.**
Unrestricted informal bid, all vendors can view and respond	Allow all vendors to view and respond to informal quote when published.
Restricted informal bid, only selected vendors can view and respond	Allow only selected vendors to view and respond to informal quote when published.

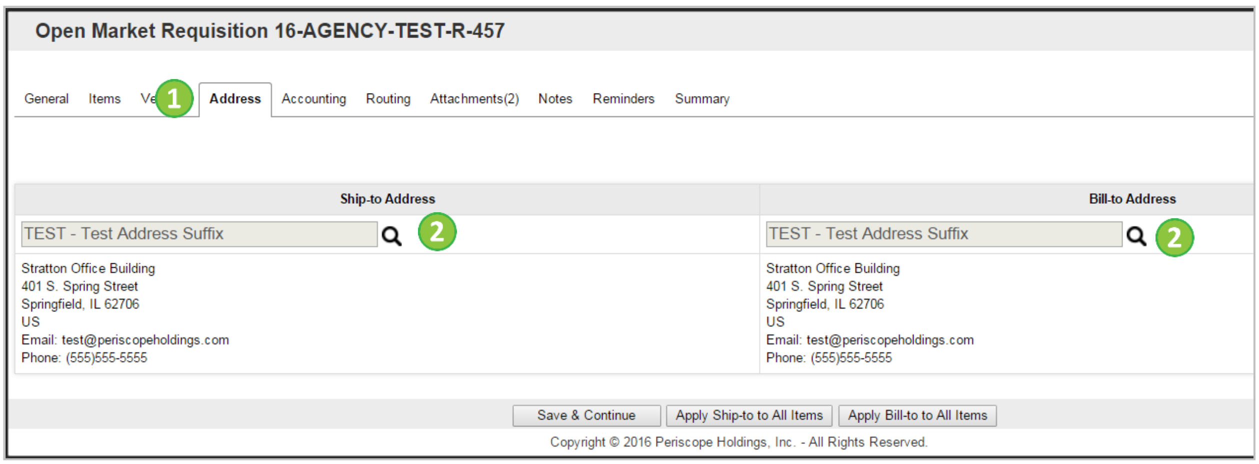
Field Name	Description
Bid Ending Date*	Gives the vendor a deadline for informal quote submittal.
Bid Available Date	Date the informal quote is visible to vendors. Once this date and time passes, the vendors will be able to see the Informal quote online. The Requisition can still be "In Progress" and posted online.
Purge Date	Purge Date is not used by the State, please leave blank.

Notify Vendors is only completed if the State wants vendors to enter a quote themselves. If the State enters the vendor quotes, this is not necessary.

Address Tab

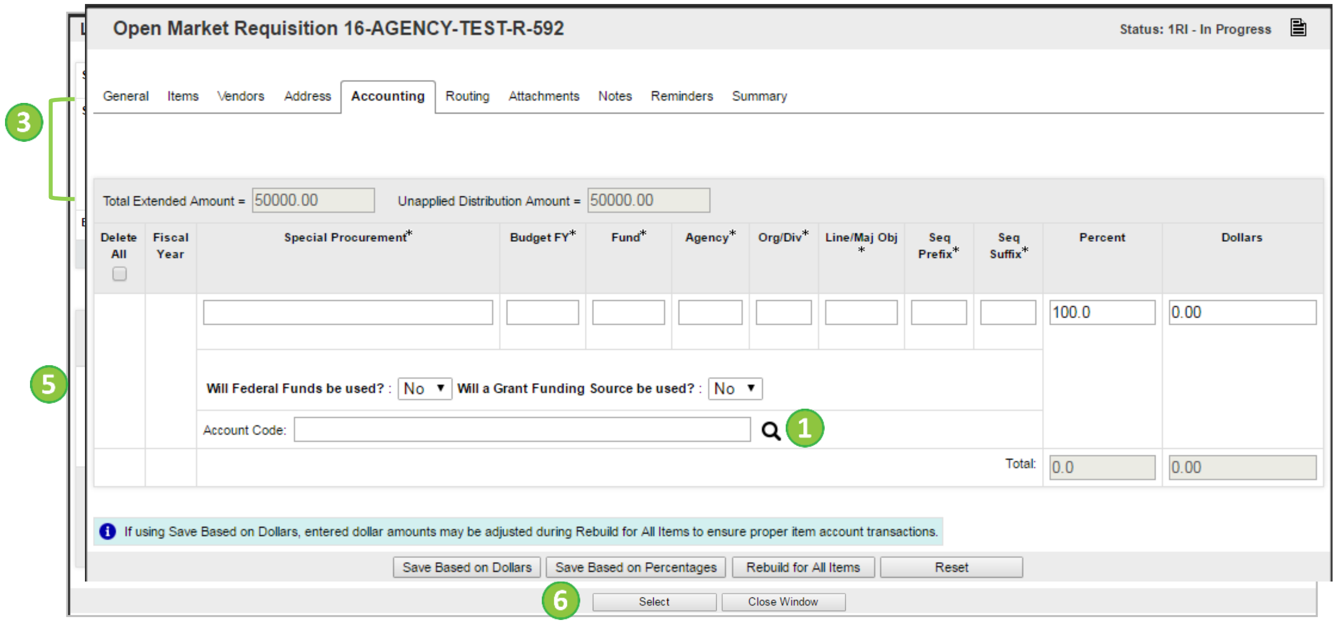
The Requisition Address is auto filled by the default for the users' setting on **Ship-to Address** and **Bill-to Address.** Typically, this would not be changed on the PO because it's the Requestors Address, not the Buyers.

1. Select **Address** tab
2. To change **Ship-to** or **Bill-to-Address**, click to search for new address

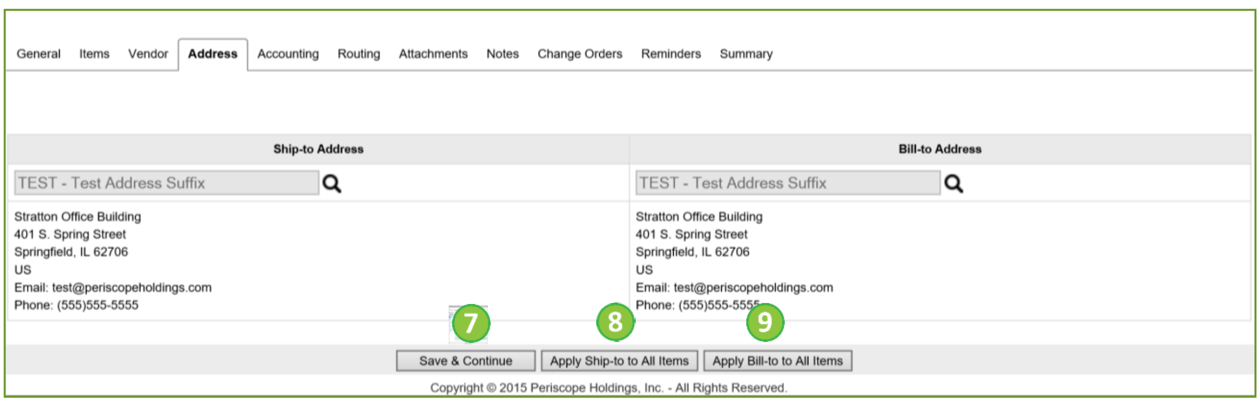


3. Enter **Search Criteria** or leave blank to receive all addresses
4. Click **Find It**
5. Select a new address

6. Click **Select** to update address



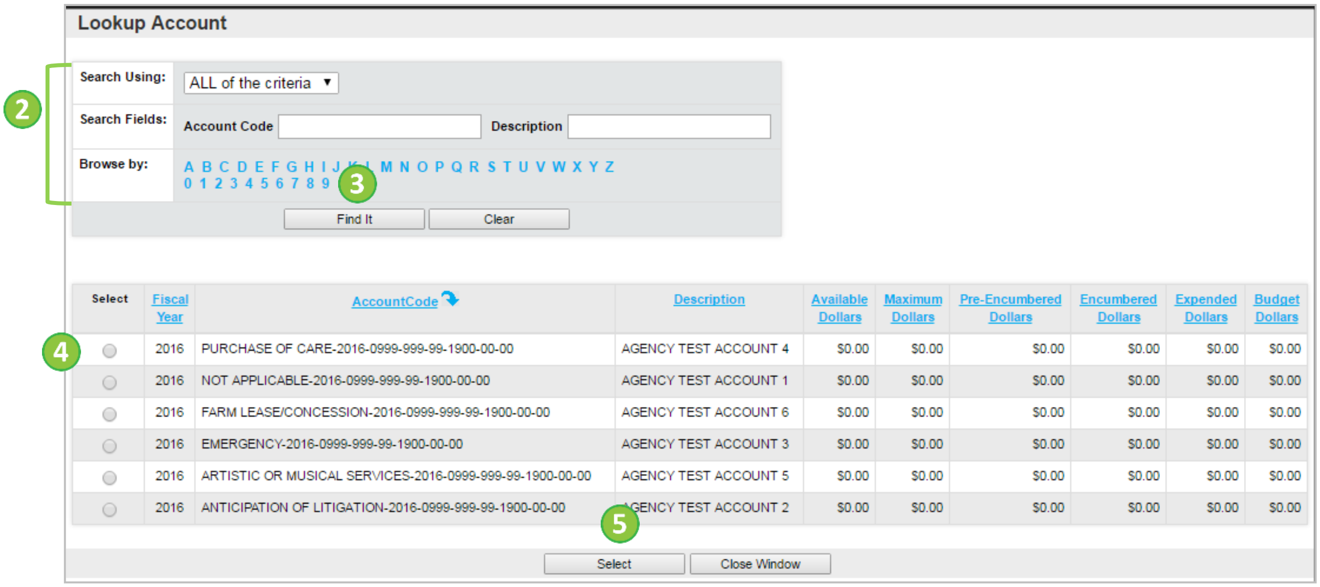
7. Click **Save & Continue** to save changes and continue
8. Click **Apply Ship-to to All Items –** to apply changes to ship-to to all items on Requisition
9. Click **Apply Bill-to to All Items** – to apply changes to Bill-to to all items on Requisition



Accounting Tab

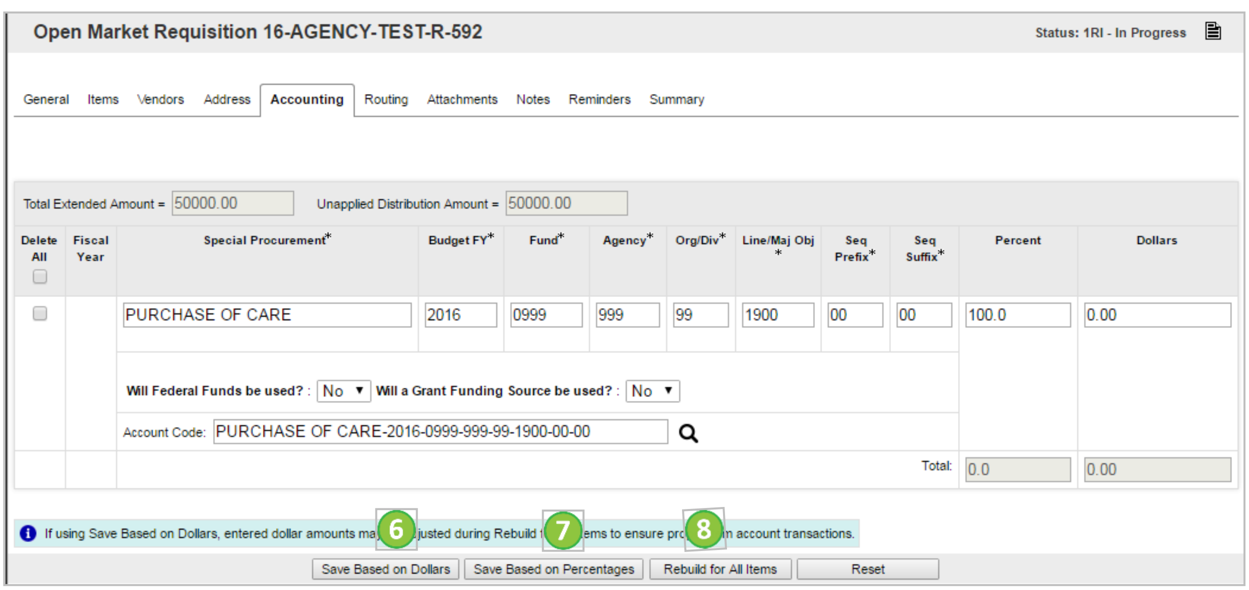
This is accounting information for all items. To itemize accounting for individual items, go to **Items** tab and select **Accounting** sub-tab.

1. Click 🔍 to search for **Account Code**
2. Enter search criteria or Browse by: letter
3. Click **Find It**
4. Select Account Code
5. Click Select



6. Click **Save Based on Dollars –** to save based on dollar amount entered, or
7. Click **Save Based on Percentages –** to apply changes and save based on percentage entered
8. Click **Rebuild for All Items –** to apply accounting to all items

If the Rebuild for All Items is not completed, a Requisition cannot be submitted for approval and conversion to a PO.



Requisition Accounting Field Descriptions

Field Name	Description
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

Routing Tab

The routing that a Requisition must follow for approval is determined by the applicable approval paths. The approval path for the Requisition is displayed on the Routing Tab. This tab remains blank until an approval path is determined when the Requisition is submitted for approval.

Requisition Routing Field Descriptions

Field Name	Description
Approval Path (header)	Approval Path ID of applied approval.
Order Sequence	Approval sequence of the approval.
Approver	The name of the approver.
Alternate Approver	The name of the alternate approver(s) associated with the approver.
Level	The level of the approver (the lowest level approves the Requisition first).
Date Requested	The date the approver was sent notification to approve the Requisition.
Date (Approved/Disapproved/Cancelled)	The date the approver approved, disapproved or cancelled the Requisition.
Action	The approval action taken by the approver: approved, disapproved or cancelled.
Comment	The comment entered by the approver during the approval process.

Attachments Tab

Both files and forms can be attached for the agency or for the vendor. This tab allows the Agency to attach Files and Forms. All forms, templates and documents related to the procurement should be attached and/or maintained in BidBuy. The information contained within the BidBuy system along with all documents becomes the official procurement file. Agencies should also maintain any records in accordance with its records retention policies. Please see Appendix B for the list of files and forms related to this procurement method.

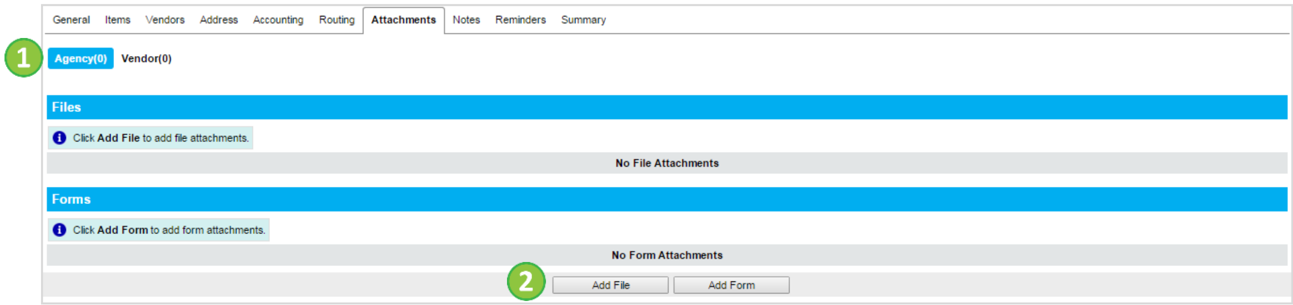
Attaching files to the BidBuy documents is a useful way to include specifications or other guidelines pertaining to the procurement. The user can attach multiple files, such as documents, spreadsheets, memoranda, etc. and can use the Attachment Tab to upload the files.

Adding Forms displays the Add Form button that allows the user to attach predefined published forms. Only those forms that are published for the organization (agency) with the specific document type and specific user role can be attached to the specific document.

For form and file information from CMS and the CPO-GS, see the Attachment Appendix.

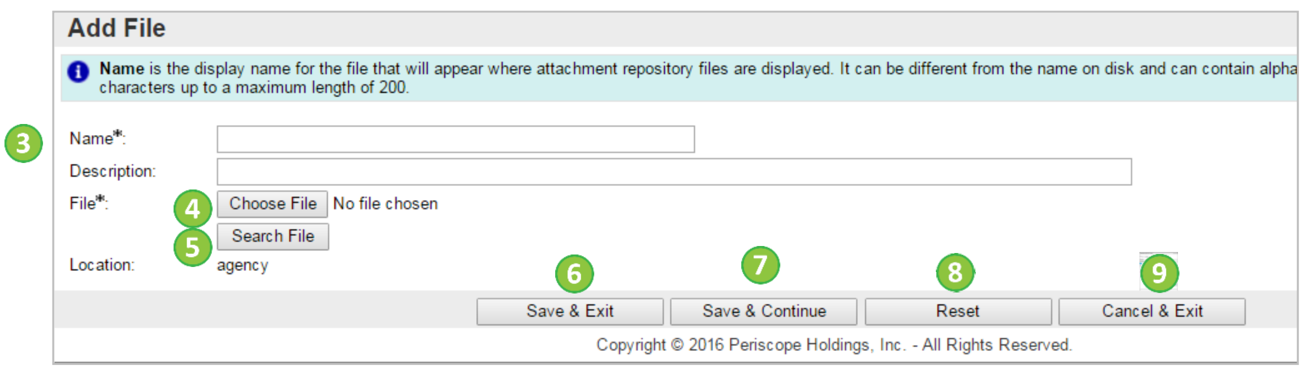
Attachments Tab: Agency

1. Under **Attachments**, select **Agency** tab
2. Click **Add File**



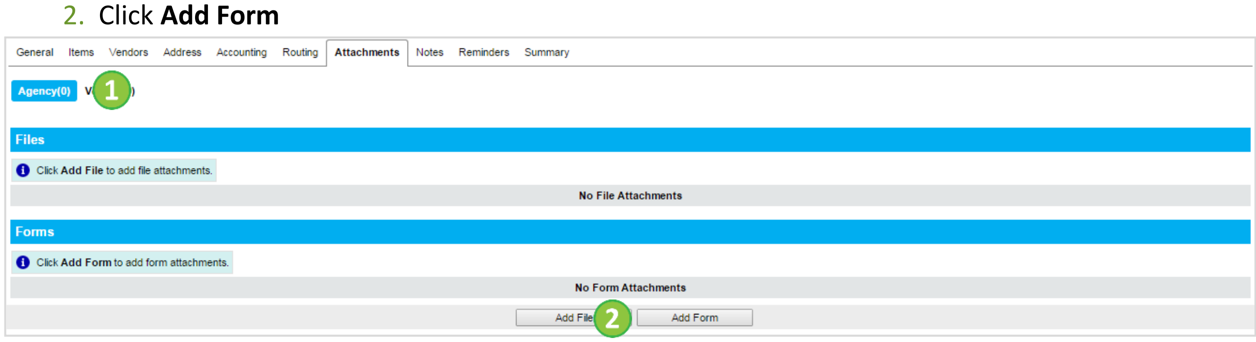
Add Agency Attachments to Requisition

3. Add file **Name** and **Description**
4. Click **Choose File** to browse the computer for a file
5. Click **Search File** to search in the repository for a file – **Not used by the State**
6. Click **Save & Exit** when done with loading the file
7. Click **Save & Continue** to save changes made and remain on the same screen
8. Click **Reset** – to reset display and start from scratch
9. Click **Cancel & Exit** to exit without adding any files



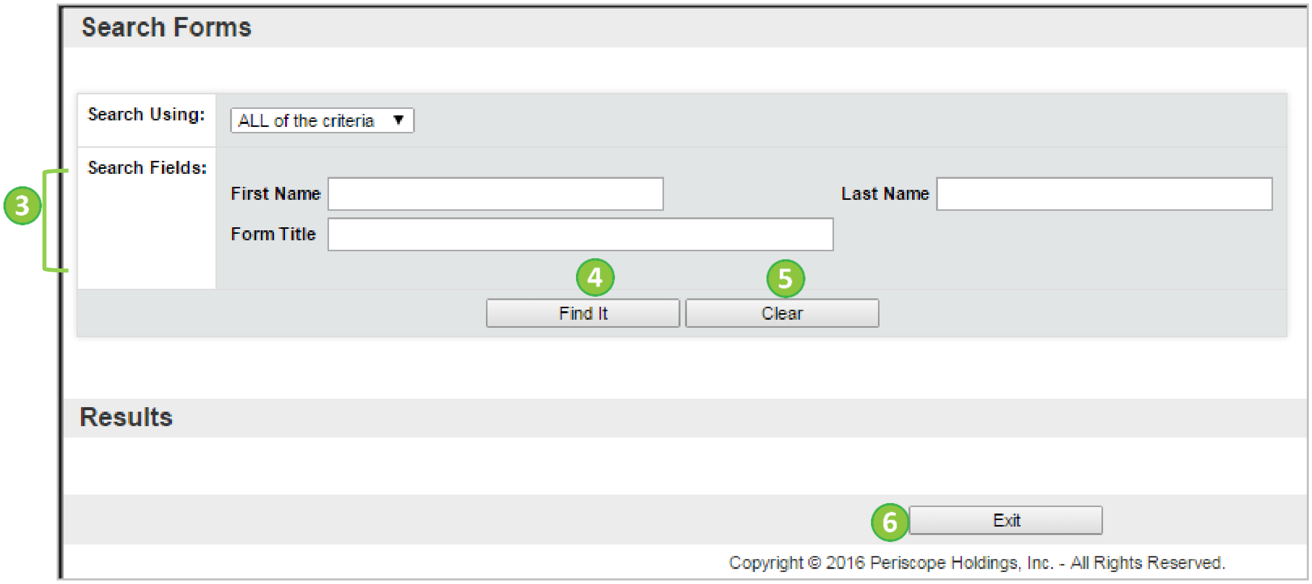
Add Agency Forms to Requisition

1. Select **Agency** tab
2. Click **Add Form**

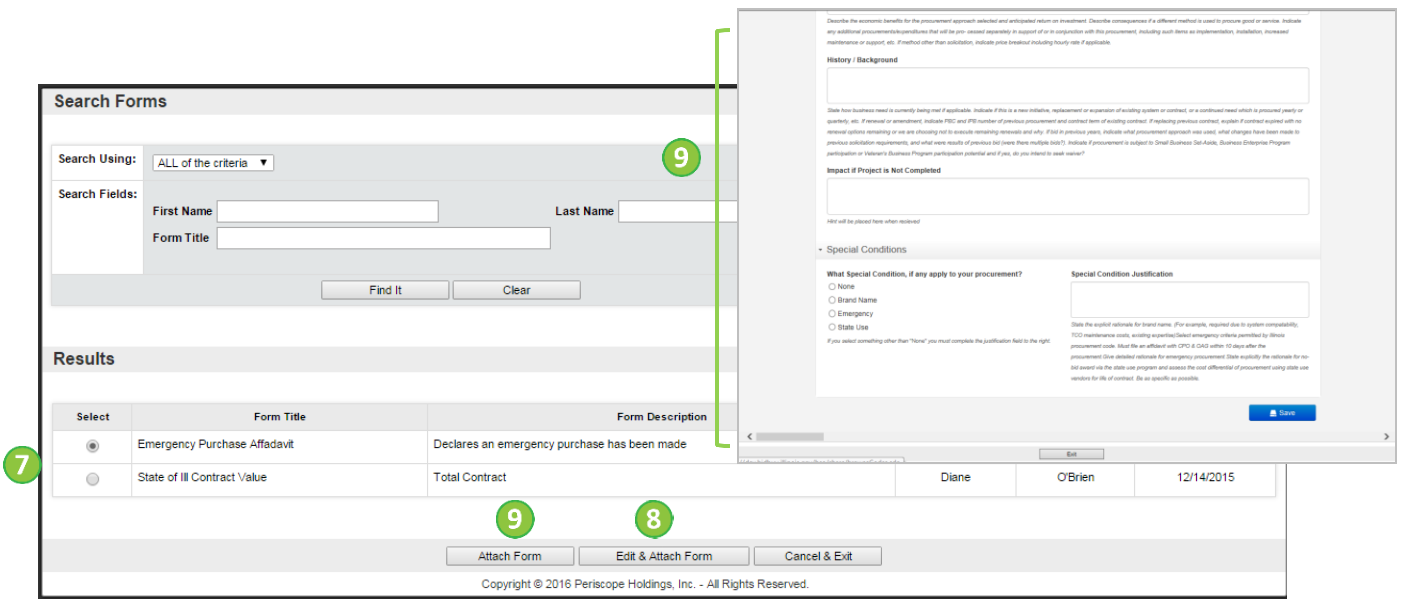


3. Enter search criteria
4. Click **Find it** to find form

5. Click **Clear** to restart search
6. Click **Exit** to exit



7. Select radio button for **Form Title**
8. Click **Edit & Attach Form** to edit form and attach to Requisition
9. Enter form information, then click **Save and Exit** buttons



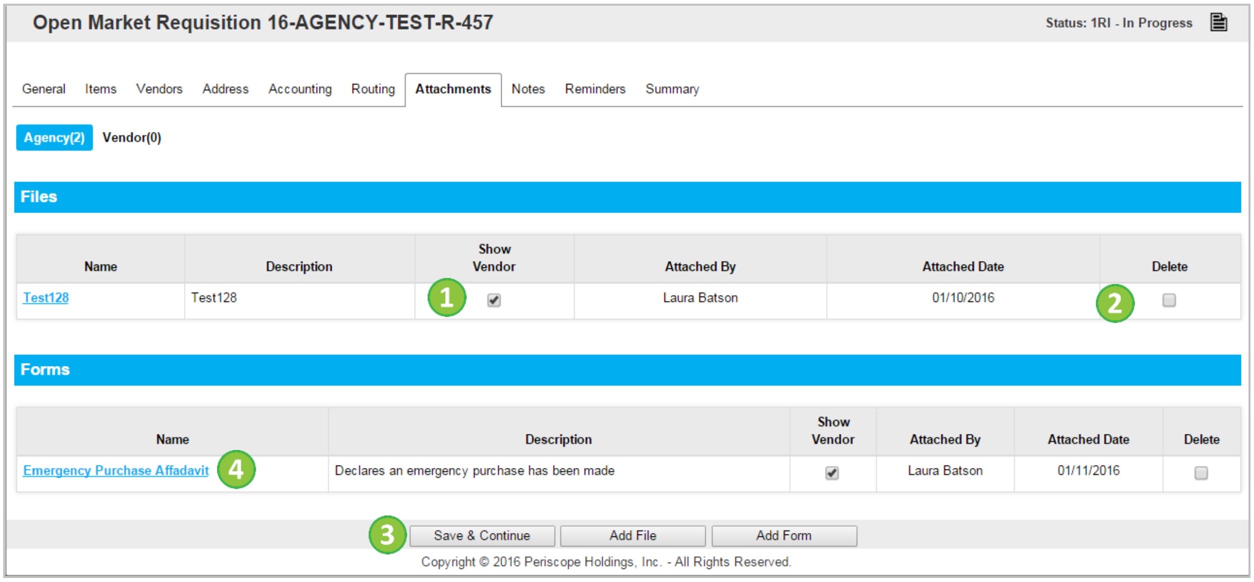
10. Click **Attach Form** to Requisition

Update Agency Attachments

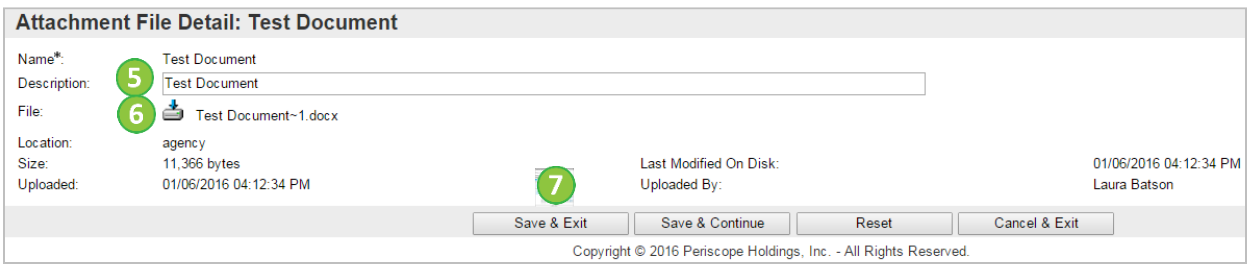
Attachments can be added and deleted. To update a specific attachment, you need to update the file outside BidBuy, then delete the old one and add the new one.

1. Select **Show Vendor** to show to all vendors
2. Select **Delete** to delete attachment
3. Click **Save & Continue** to save changes

4. Click **Name** to update **Description** or download attachment



5. Update **Description**
6. Download file, click 
7. Click **Save & Exit**

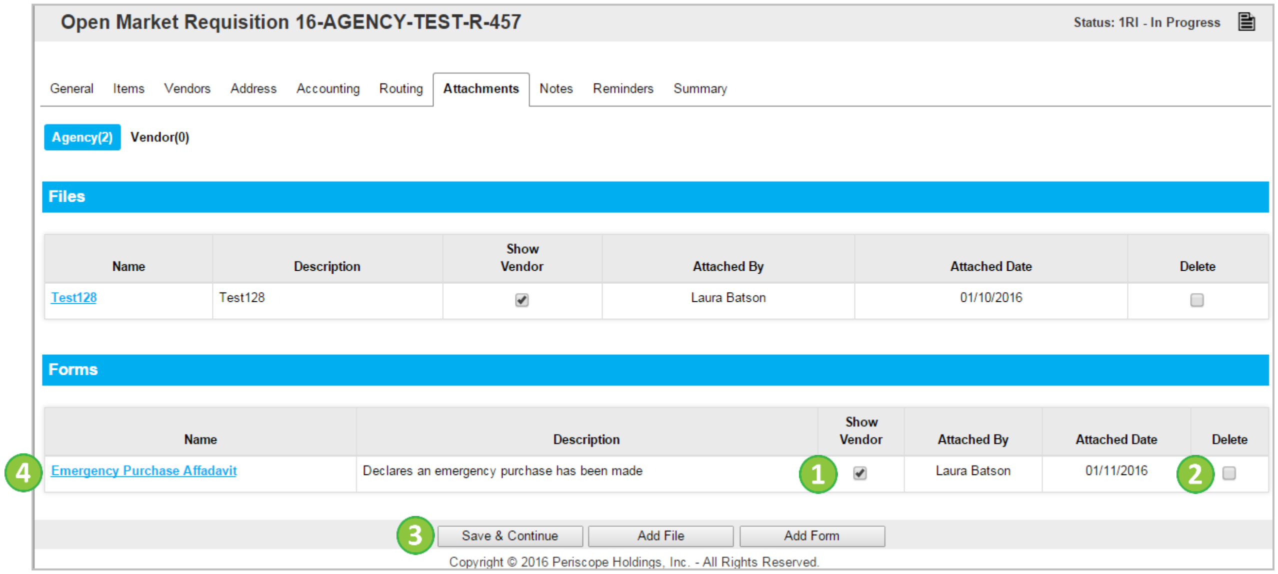


Other information must be updated by deleting and adding a new file.

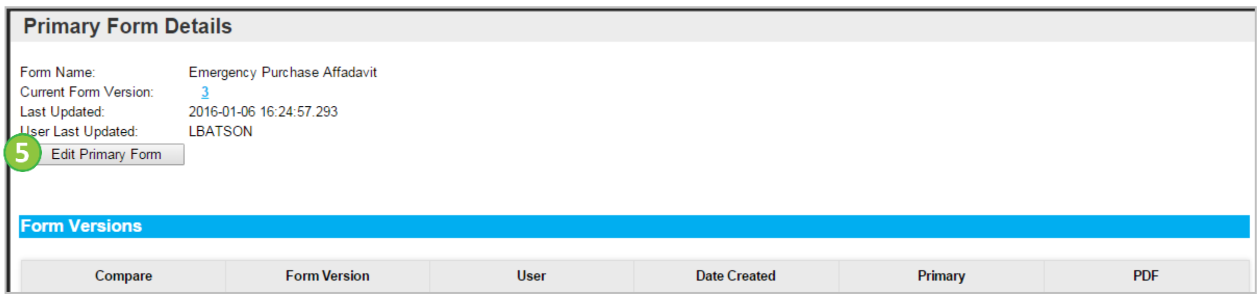
Update Agency Forms

Forms can have multiple versions. If anything is added to a form, it then becomes the primary form.

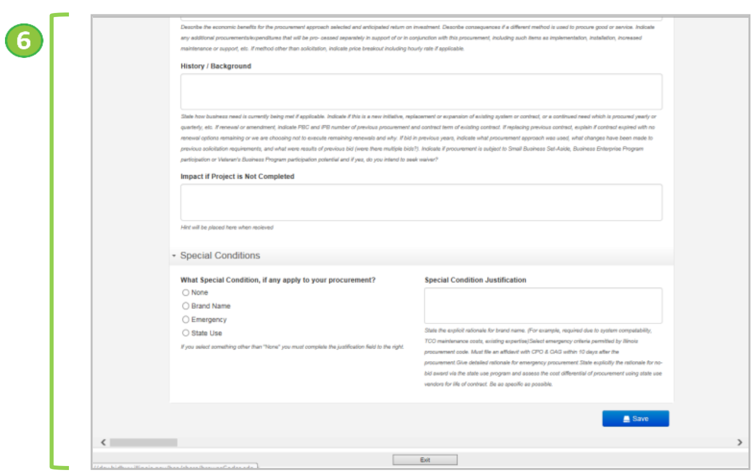
1. Select **Show Vendor** to show to all vendors
2. Select **Delete** to delete form
3. Click **Save & Continue** to save changes
4. Click **Name** to view and modify form



5. Click **Edit Primary Form** to complete the form

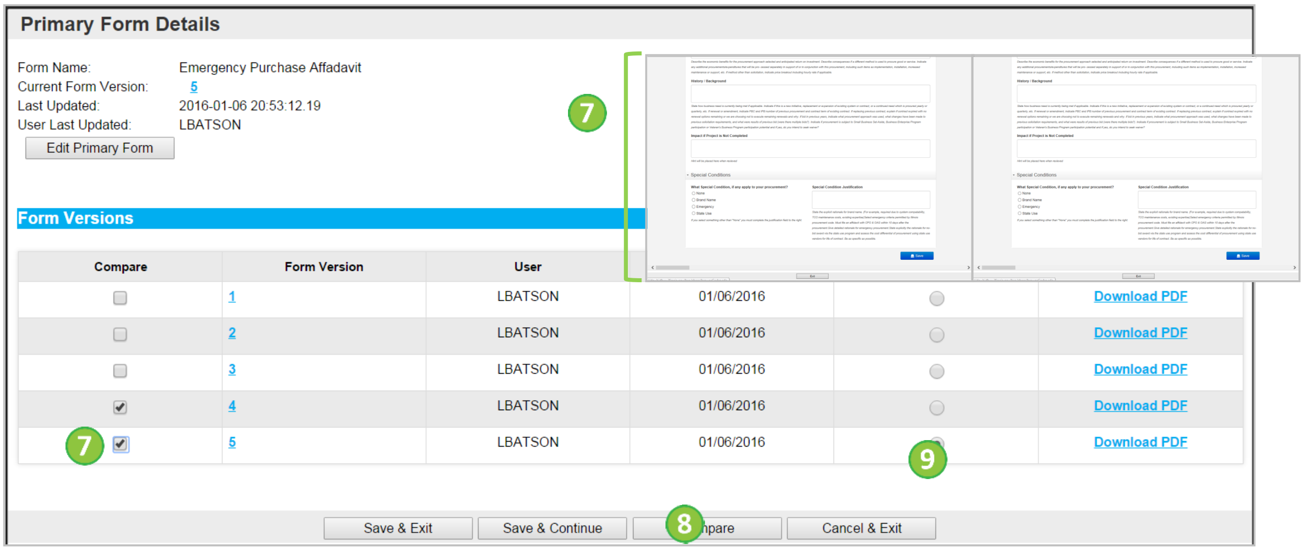


6. Complete the form information, then click **Save and Exit**

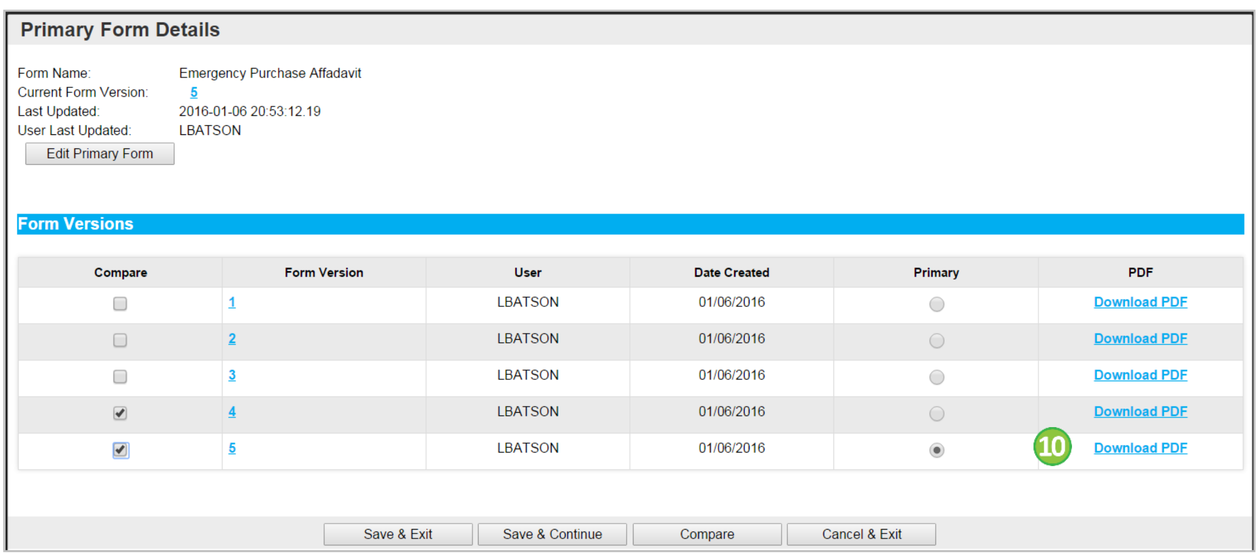


The updated form defaults as the Primary form.

7. Select **Compare** on the forms to compare
8. Click **Compare**
9. Review the two forms for changes and click **Exit** when finished



10. To view form as PDF, click **Download PDF**

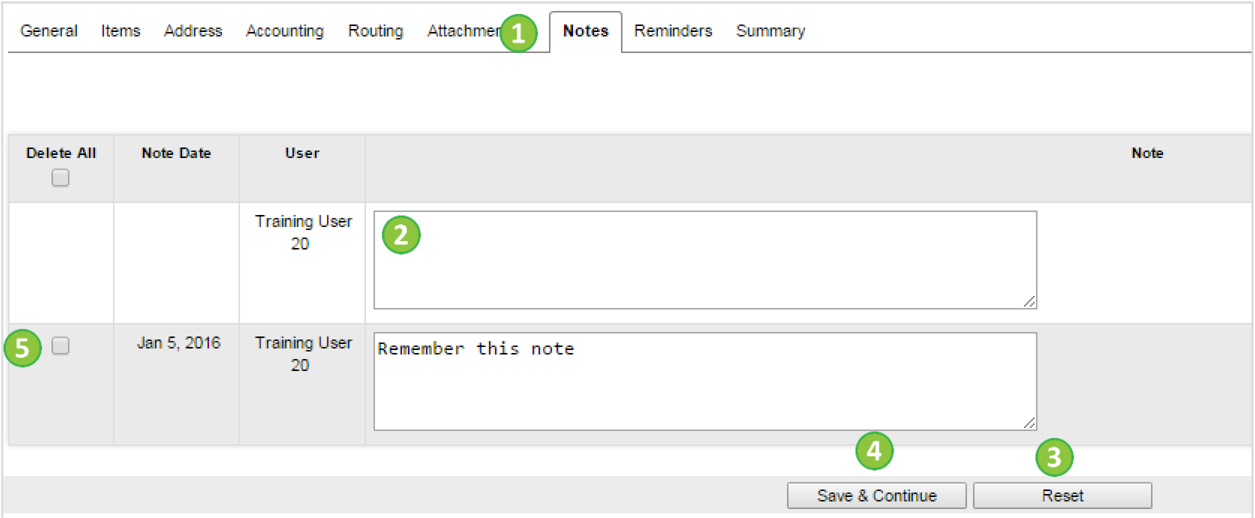


Form appears in PDF default viewer to save, print, etc.

Notes Tab

The **Notes** tab allows the user to add, edit and delete notes to provide additional information or special instructions for internal users. Only the user may edit their note. These notes are associated with all items on the Requisition. To add notes to specific items, go to the Items tab. A note is similar to a post-it note, and is used as an internal communication.

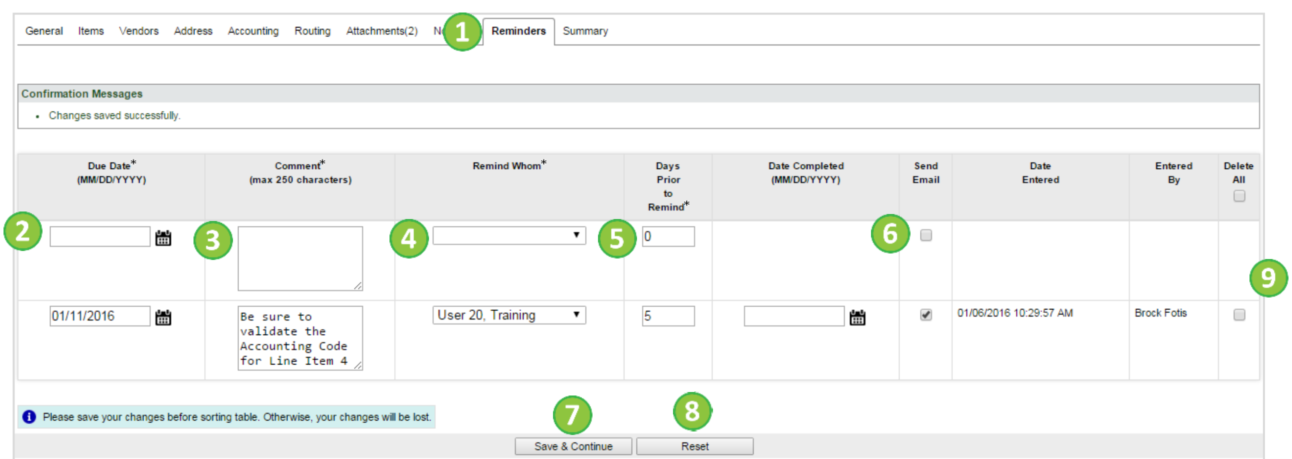
1. Select **Notes** tab
2. Enter note text
3. Click **Reset** to clear form
4. Click **Save & Continue** to save notes
5. To delete a note, select **Delete** and **Save & Continue**



Reminders Tab

Reminders are a useful function of the application to send to a specific State user of BidBuy on a specific date.

1. Select **Reminders** tab
2. Enter the **Due Date** for the Reminder
3. Enter the Reminder **Comments**
4. Select **Remind Whom** from drop-down list of agency users
5. Enter **Days Prior to Remind**
6. Select **Send Email** for email reminder
7. Click **Save & Continue** to save reminder
8. Click **Reset** to empty all fields not yet saved
9. To delete a reminder, select the **Delete** and click **Save & Continue**



See Requisition Reminder Field Descriptions Table. All fields with an Asterisk * are required.

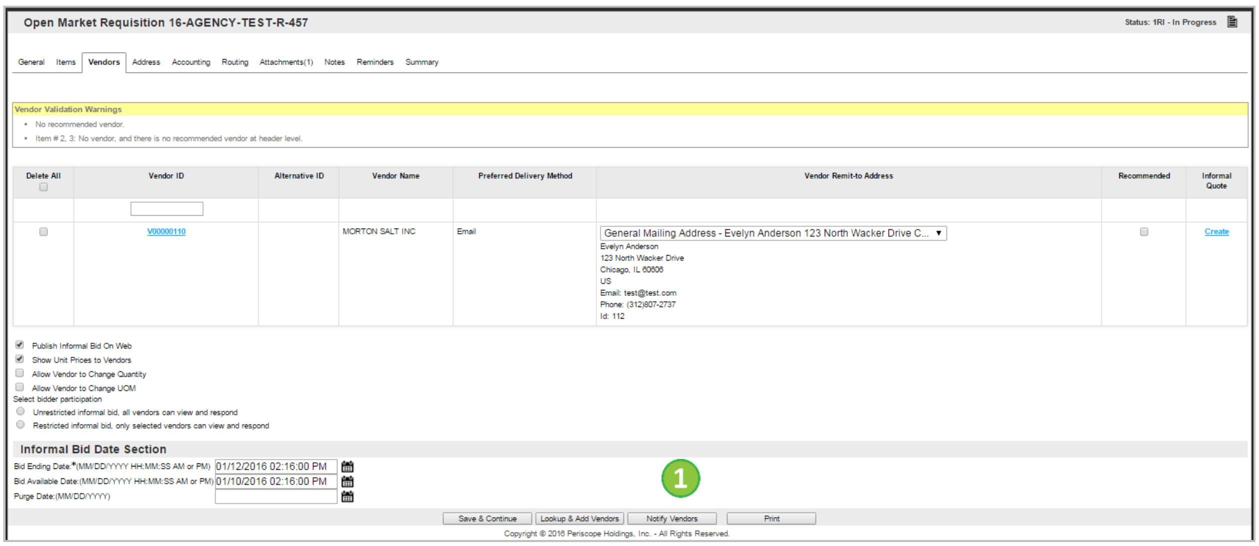
Requisition Reminder Field Descriptions

Field Name	Description
Due Date* (MM/DD/YYYY	Using the calendar lookup icon, select the date the reminder is due.
Comment*	Enter up to 250 characters of comment text.
Remind Whom*	Using the dropdown menu, select the person to remind.
Days Prior to Remind*	Enter the number of days prior to the due date the person should be reminded. The user can enter up to 9999. "0" will post the reminder on the due date.
Send Email	To send out an email reminder, place a check in the checkbox.
Date Entered	Displays the date and time the reminder was created.
Entered By	Displays the name of the person who created or edited the reminder.
Delete	When checked and the Save & Continue button is selected, the reminder is deleted from the vendor performance document.
Date Completed	The Date the user from the Remind Whom, has marked the reminder as being accomplished.

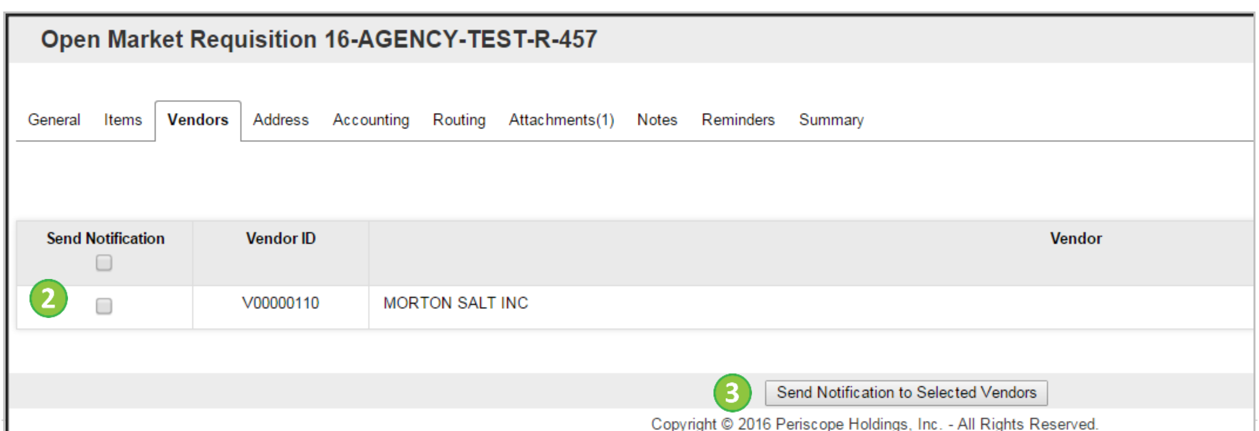
Notify Vendors of Informal Bid

Vendor Tab

1. On **Vendor** tab, click **Notify Vendors**

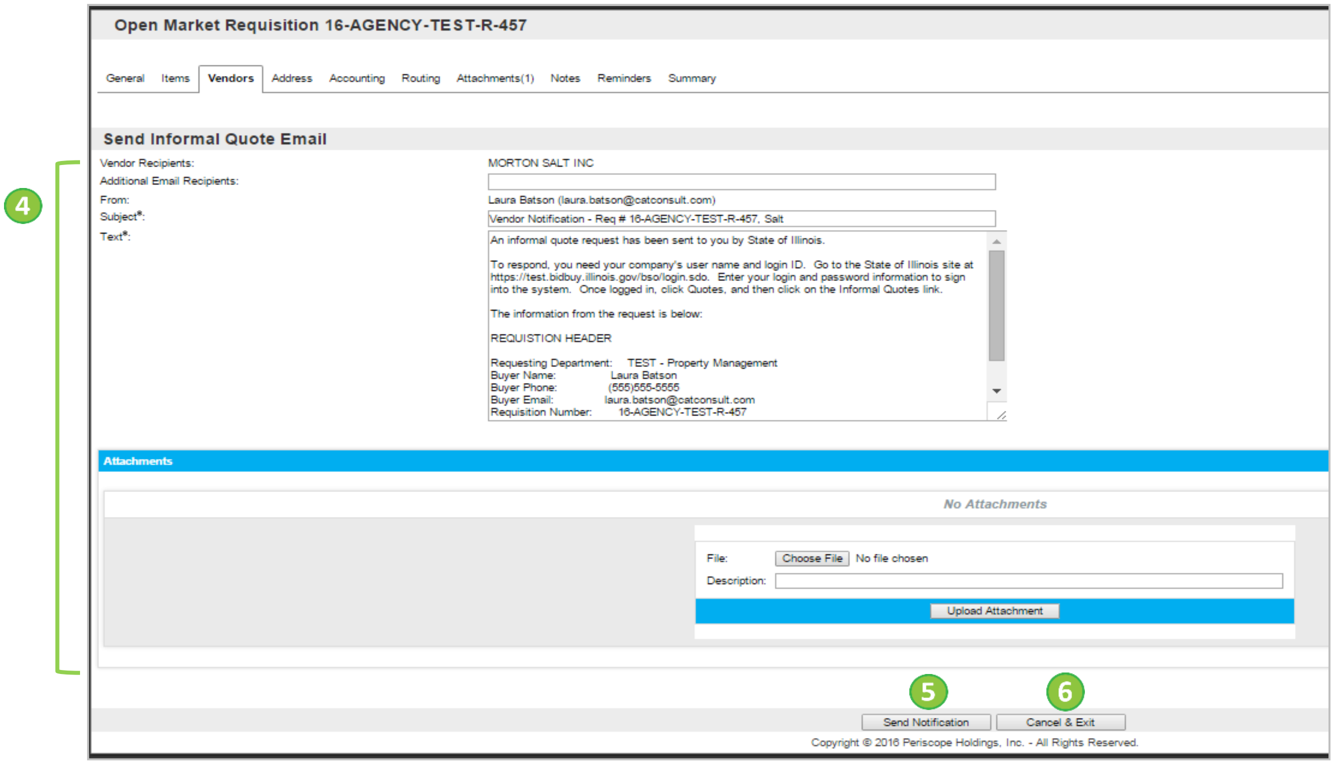


2. Select **Send Notification**
3. Click **Send Notification to Selected Vendors**



Email message is standardized text. Fields can be updated or modified.

4. Update information and add attachments if necessary
5. Click **Save & Exit** to send email to vendors selected
6. Click **Cancel & Exit**



Email message is standardized text. Fields can be updated or modified.

7. Update information and add files if necessary
8. Click **Save & Exit** to send email to vendors selected
9. Click **Cancel & Exit**

Tabulate and Recommend Vendors

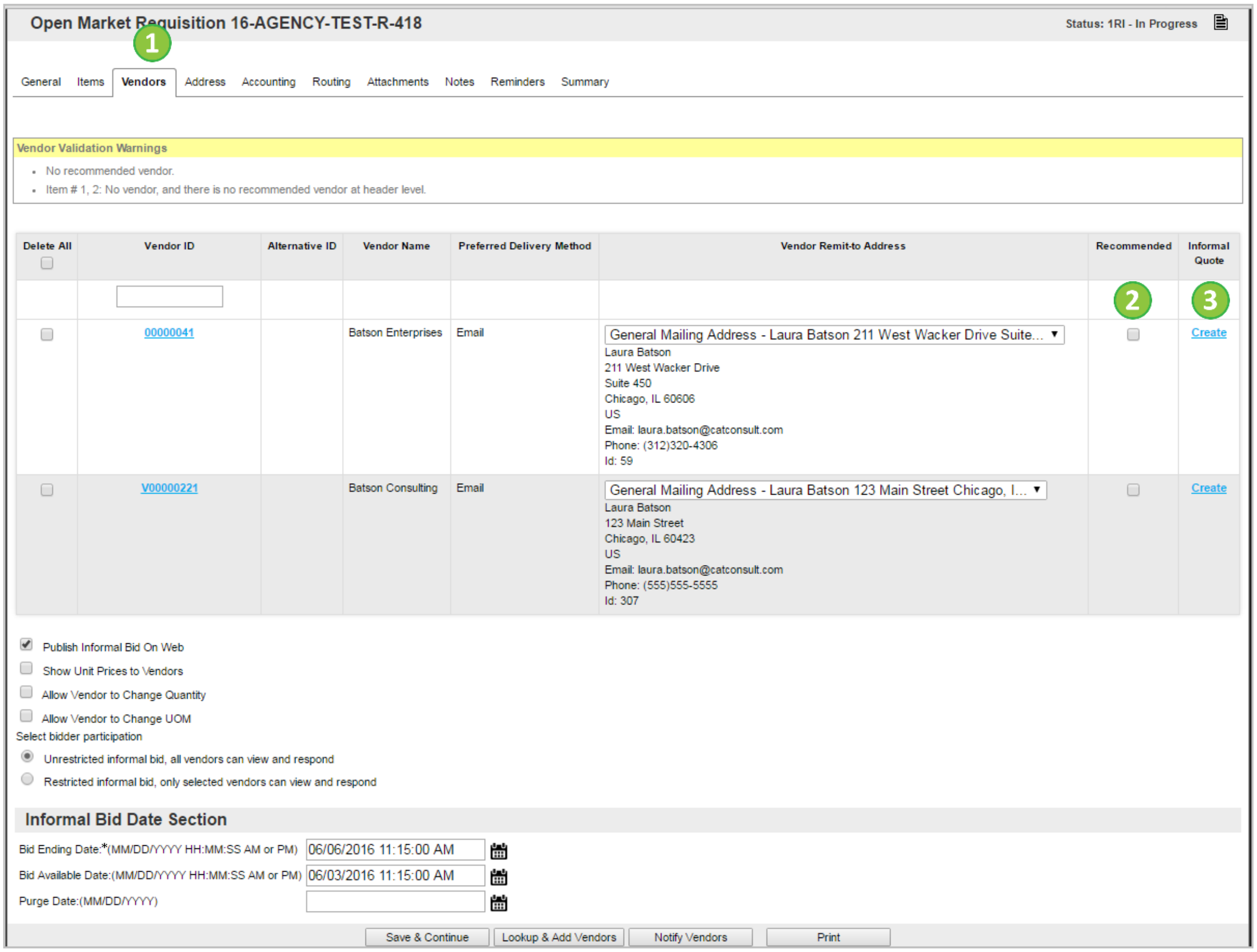
Enter Informal Quotes for Vendors

Informal quotes are similar to the standard (also known as "formal") bid structure in BidBuy. Unlike a formal bid, the informal bid's quotes are not locked until the opening date has been reached, and the date/time of the opening can be changed as needed. This means that an informal quote on a Requisition is a quick and easy way to accumulate quotes from selected vendors without the time constraints of a formal bid. The State allows users to solicit quotes with the Informal Quotes or the Informal Bid on Small Purchases < $10,000. Small Purchases > $10,000, must be processed with the Informal Bid.

You can post the informal quote online and allow the vendor to enter the pricing or you can enter the information for them directly on the Vendor tab of the Requisition.

The informal quote must be completed during the Requisition process and prior to submittal for approval on the Summary Tab.

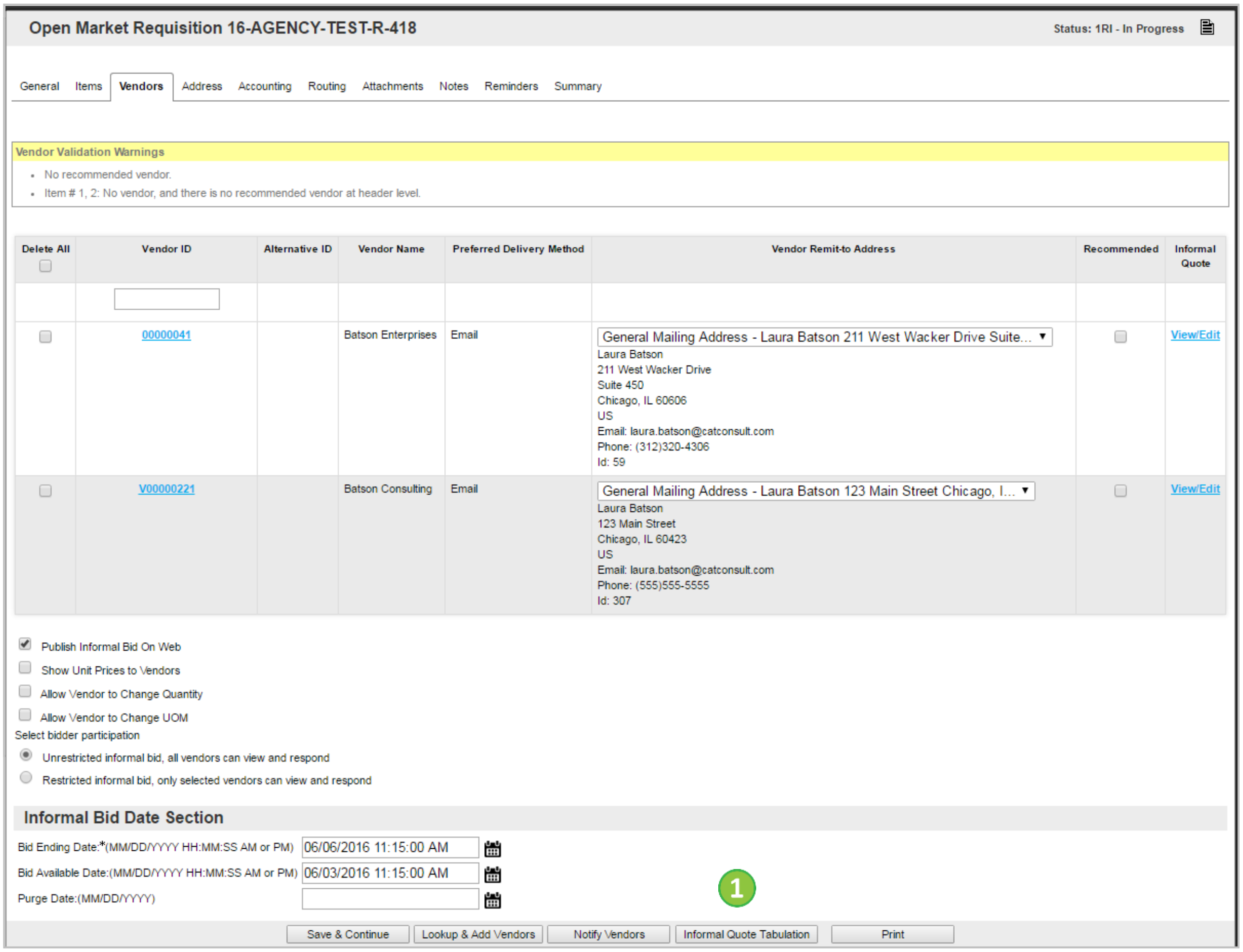
1. Select **Vendor** tab
2. Check **Recommended** to recommend this vendor for this purchase, which is optional
3. Click **Create** to manually enter informal quote pricing



4. Enter vendor pricing for the informal quote
5. Click **Save & Exit** to save and exit
6. Click **Save & Continue** to save and continue entering pricing information

The user has to Save & Exit or Save & Continue to save the changes before selecting Close Window

7. Click **Close Window** to exit the screen



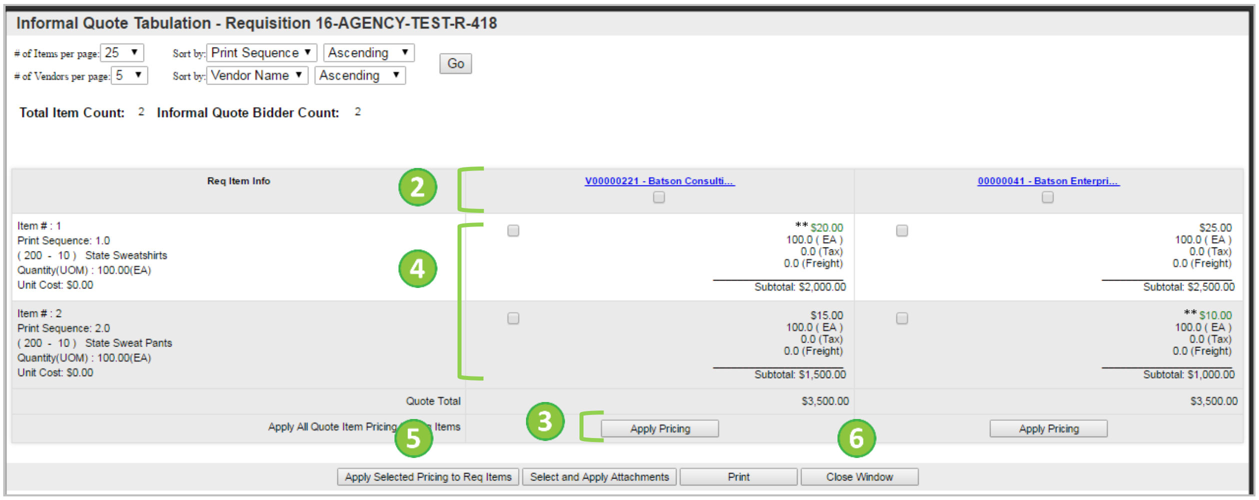
Recommend Vendor

> Once quotes are entered, Informal Quote Tabulation appears at the bottom of the Vendor Tab.

Select Vendor(s) Informal Quote(s)

Informal Quote Tabulation allows the user to recommend a vendor for each item or all items.

1. Under **Vendor** tab, scroll to the bottom of the **Vendor** tab and click **Informal Quotes Tabulation**
2. To select all pricing for single vendor, click box under vendor name
3. Click **Apply Pricing** to apply all items to a single vendor
4. To select pricing by item for vendors, click box for vendor by item
5. Click **Apply Selected Prices to Req Items** to apply individual items to vendors
6. Click **Close Window**

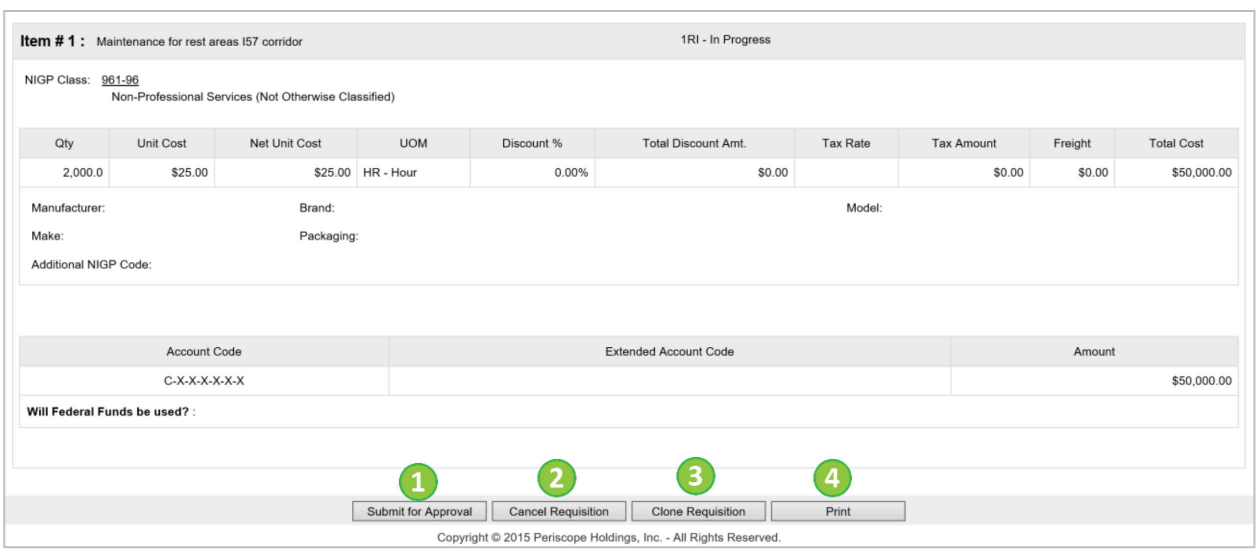


Submit Requisition for Approval

Summary Tab

The Summary Tab will feature all the data entered and selections made by the user in the previous tabs. The Summary Tab gives the user an opportunity to review all applicable information and return to any given tab to edit errors or update with new information. At the bottom of Summary tab,

1. Click **Submit for Approval** to submit document for approval once the requisition is complete
2. Click **Cancel Requisition** to delete Requisition
3. Click **Clone Requisition** to start another Requisition with all the settings and data of the current one
4. Click **Print** to print Requisition

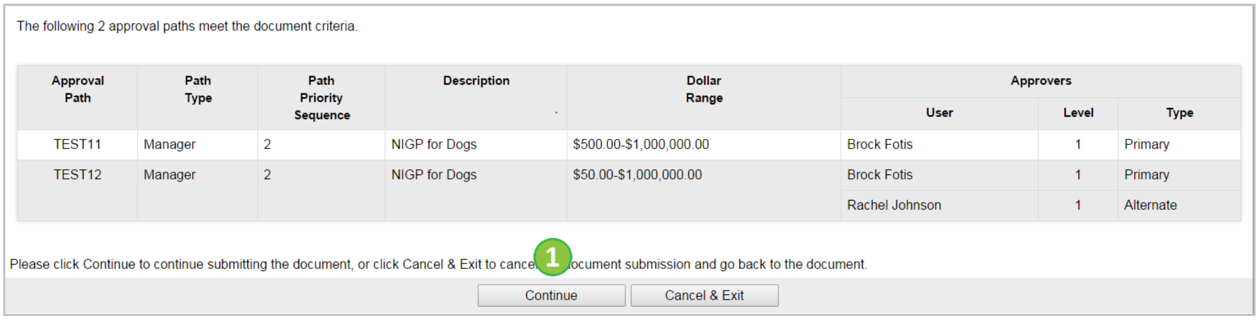


Submit for Approval

When an approval path is configured for the Requisition, the approvers will attach to the Requisition and it will move to Ready for Approval status.

Once the tabs are completed, including all required fields, the user may submit the complete document for approval.

1. Click **Continue** to send approver email to approve



The following 2 approval paths meet the document criteria.

Approval Path	Path Type	Path Priority Sequence	Description	Dollar Range	Approvers		
					User	Level	Type
TEST11	Manager	2	NIGP for Dogs	$500.00-$1,000,000.00	Brock Fotis	1	Primary
TEST12	Manager	2	NIGP for Dogs	$50.00-$1,000,000.00	Brock Fotis	1	Primary
					Rachel Johnson	1	Alternate

Please click Continue to continue submitting the document, or click Cancel & Exit to cancel document submission and go back to the document.

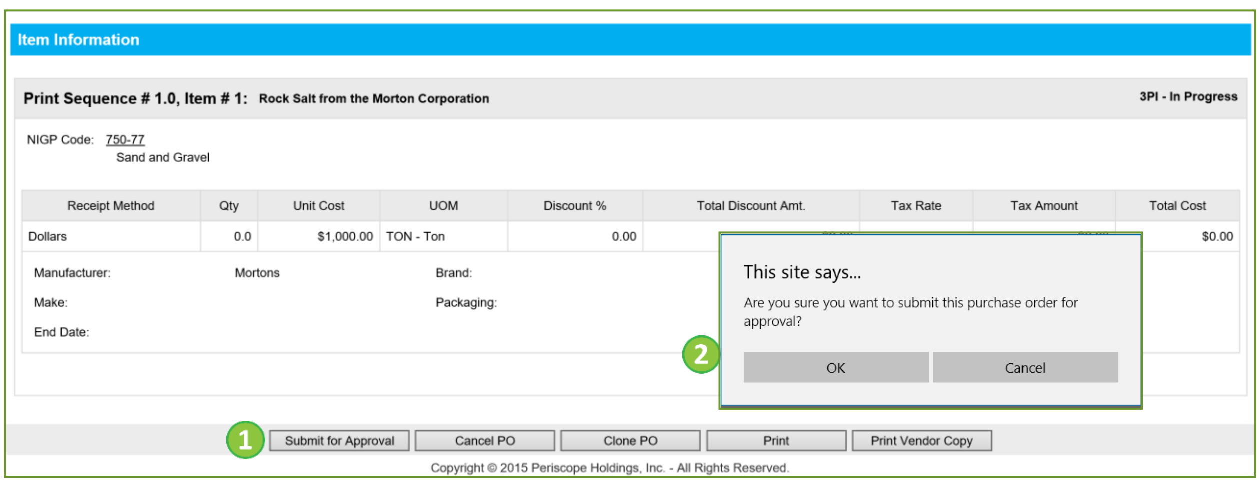
Continue | Cancel & Exit

The sequence number is the order in which the approver can approve the document.

When there is no approval path assigned, the user is prompted to select:

- **Automatic Approval** – Selecting this will move a document to Ready for Purchasing status. This option is visible when there are no configured approval paths on the document.
- **Manually Add Approvers** – Requires the user to choose from a drop down list with individuals designated as approvers. The user selects an individual; clicks add approver and then saves the approval (see example below).

1. Click **Submit for Approval**
2. Click **OK**



3. Select **Manually add Approvers** to add additional approvers (This option only appears when no approval paths are configured for this document.)
4. Select **Approvers** from drop-down list and click **Add Approver**
5. Click **Save & Continue** to continue
6. Click **Cancel & Exit** to exit

Approver will receive an email notifying them that their approval is needed

Convert Requisition -

To Bid (> $10,000)

To Purchase Order (< $10,000)

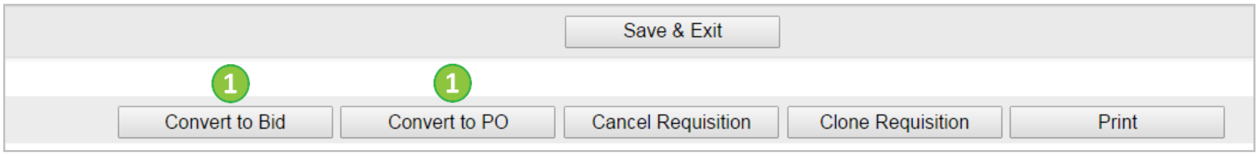
A requisition created by an Agency (Not CMS) will route (via NIGP Code) to CMS BOSS. The following table outlines the process used to determine whether a procurement will be conducted by CMS BOSS or be designated to the agency.

	OPTION 1 – **Agency Driven**	**OPTION 2 –** **CMS Driven**
Status		
Ready for Approval	CMS BOSS approves and identifies as “Designated to Agency” in the Notes Tab.	CMS BOSS approves and identifies as “CMS Driven” in Notes Tab (used for Master Contracts)
Ready for Purchasing (Auto Assigns Req. to Agency Buyer as Purchaser)	AGENCY BUYER continues the Procurement	AGENCY BUYER goes to Requisition/General Tab and changes Purchaser to CMS BUYER

CMS BUYER converts Requisition to a Bid as appropriate	CMS BUYER begins a new Requisition

Once the award is selected and approved, the BP user can convert the solicitation into a Purchase Order. The information can be updated and added to on the resulting Purchase Order.

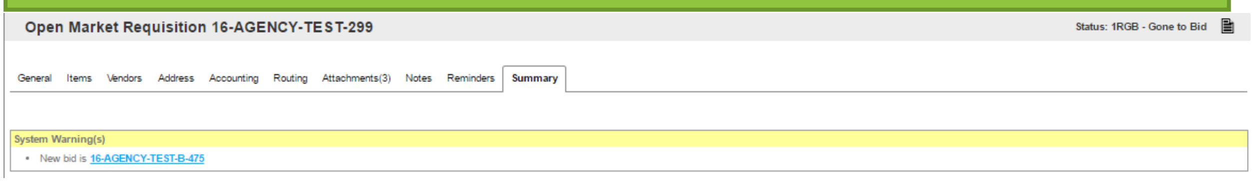
1. Scroll down to the bottom of Summary tab
    a. Click **Convert to Bid** (<$10,000) or



    b. **Click Convert to PO** (>$10,000)

2. Continue to the Bid from the Requisition Summary tab, click Bid **link**

For Small Purchases > $10,000, continue to the Process Purchase Order section. For Small Purchases < $10,000, continue with the next steps.



Process Bid

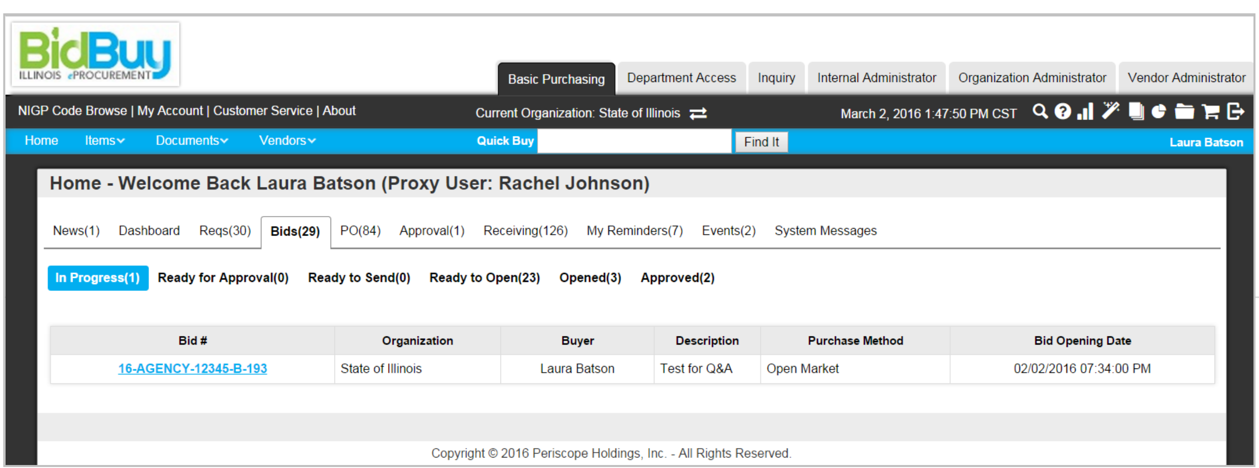
The State uses a Bid to allow a user to publish solicitation opportunities online using the BidBuy system. Open Bids are available for quotes from all registered vendors and are searchable by an unregistered public user.

A Bid document can be created either from an approved Requisition in Ready for Purchasing status or from scratch by a Basic Purchasing user, but ***State procurements always start with a Requisition***.

The Bid document accomplishes 3 objectives:

- Identifies the anticipated procurement method,
- Routes a drafted solicitation document for approval, and,
- When approved, publishes the notice to the general public and vendor community.

At the end of the Open Market Requisition section, a Bid number was assigned by selecting the “Convert



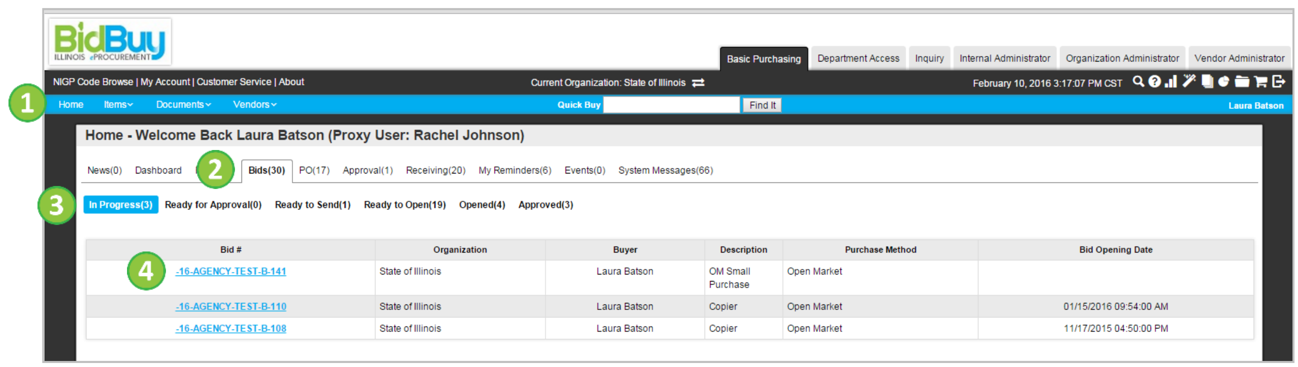
to Bid" button on the bottom of the Requisition Summary Tab, following Req approval.

Bid Status from the Home Page

- **In Progress** – Bids that are in draft form and may not have all required data filled out
- **Ready for Approval** – Bids that have completed required data and are ready for approval
- **Ready to Send** – Bids that have been approved and ready to send to the vendor
- **Ready to Open –** Bids whose Bid opening date/time has passed but have not yet been opened
- **Opened** – Bids opened and being reviewed
- **Approved** – Award has been approved on these bid awards approved

From the BidBuy Home screen:

1. Click **Home** on the blue ribbon
2. Select **Bids**
3. Select **In Progress**
4. Click **Bid #** to view bid



Add Missing Information & Update Tabs

The Bid allows for revisions based on new information and also solutions to errors that carried over from the Requisition. There are some fields that do not relate to the requisition but are necessary to have for the Bid. These fields are flagged General Validation errors and need to be updated by the user. For a Bid, two mandatory updates are presented:

After converting to a Bid, the data from the Requisition is auto-populated. In addition, any new fields are flagged as errors.

General Tab

The General information from the requisition can be updated in the In-Progress status. The State uses two Purchase Methods: Open Market and Blanket.

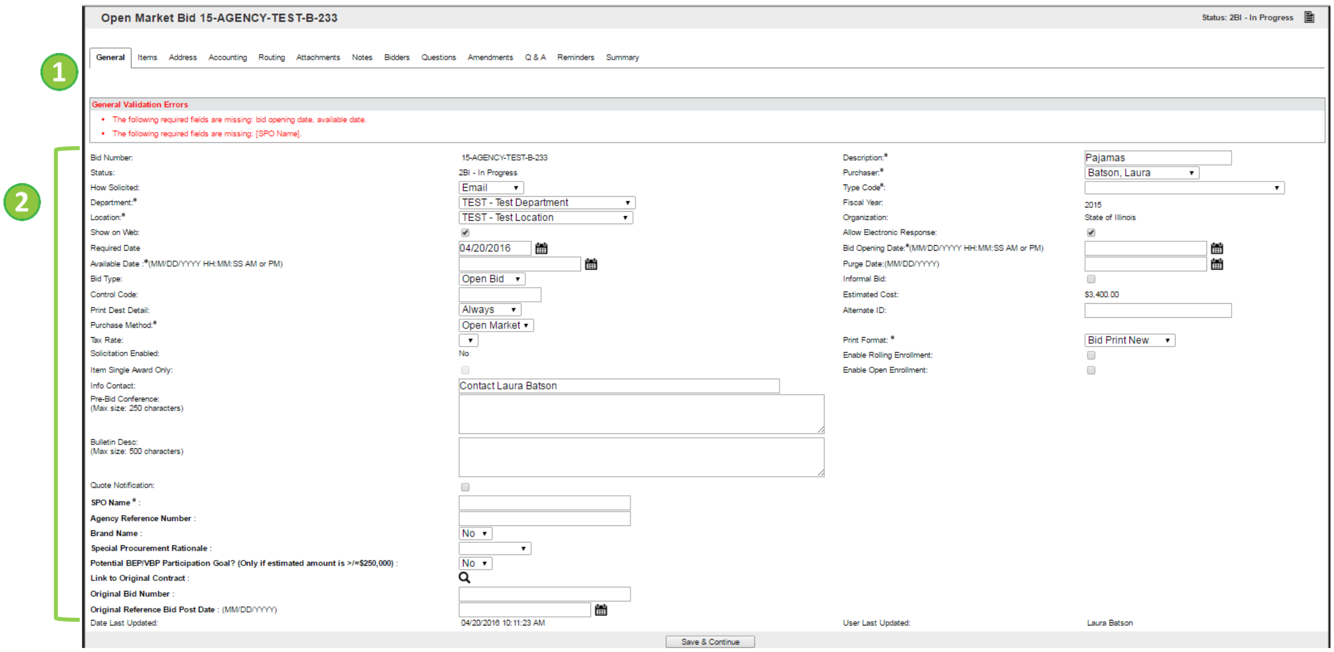
Open Market Bid to Open Market Purchase Order allows the user to create a bid for a one-time purchase.

Blanket Bid to Blanket Purchase Order allows the user to create a master contract for agencies to order goods or services over a specified period of time. The Purchase Order allows the user to create a master contract for agencies to order off of over a specified period of time.

1. Select **General** tab
2. Enter general information

See Bid General Field Descriptions Table. All fields with an Asterisk * are required.

3. Click **Save & Continue** to save information



Bid General Field Descriptions

Field Name	Description
Bid Number	This number is automatically generated when the user selects Save & Continue.
Description*	Enter a short description to help identify the bid. Use Complete words, not abbreviations. Start with alpha agency identifier, and then describe the item to be procured. Use noun, adjectives
Status	The current status of the bid.
Purchaser*	Using the dropdown menu, if available, select the basic purchaser for this bid. The default of the purchase is determined by the configuration of the system.
How Solicited	Using the dropdown menu, select the best option that identifies how the vendors will be solicited.
Type Code	Using the dropdown menu, select the Type code. The Type Code is user-defined and maintained in BidBuy. 1. Invitation For Bid (IFB)

Field Name	Description
	2. Request for Proposal (RFP) 3. Request for Information (RFI) 4. Sole Source 5. Emergency 6. Emergency Extension (11/9-11/10) 7. State Use 8. Anticipation of Litigation (Exempt) 9. Purchase of Care (Exempt) 10. Small Purchase 11. Artistic or Musical Services (Exempt) 12. Reverse Auction 13. Change Order 14. Renewal 15. General Notice
Department*	Using the dropdown menu, select the department this bid is for if the default department displayed is not correct.
Organization	The organization of the department that the bid is for. The organization is defaulted from the user profile default organization and is not subject to change.
Location*	Using the dropdown menu, select the location this bid is for, if the default location is not desired.
Fiscal Year*	Defaults to the current fiscal year. Can be changed using the dropdown menus, select the fiscal year for this bid. This is only applicable during the FY roll period.
Show on Web	Check if this bid is to be displayed and seen by vendors on your agency's BidBuy website.
Allow Electronic Response	Check if the vendors are allowed to submit electronic quotes for the bid. Most will be shown on Web, but potentially not all will allow electronic response.
Required Date	Enter the date (mm/dd/yyyy) the commodity or service is required by or use the calendar lookup icon to select the date.
Bid Opening Date*	Enter the date and time (MM/DD/CCYY HH:MM:SS AM or PM) or use the calendar lookup icon to select the date and time of the bid opening or use the calendar lookup icon to select the date and time. Bid opening date is when the bids are opened by the State and no other bids are accepted.
Available Date*	Enter the date and time (MM/DD/CCYY HH:MM:SS AM or PM) or use the calendar lookup icon to select the date and time the bid is available to be viewed and quoted upon. The availability date is the date that the bid becomes active and posts to the system for vendors to act upon.
Purge Date	Enter the date (MM/DD/CCYY) this bid is identified to be purged from the BidBuy system.
Bid Type	Using the dropdown menu, select the bid type, Open Bid or Closed Bid. The bid type defaults to Open Bid unless vendor subscription is enabled, and then it defaults to Closed Bid. **The State only uses Open Bids.**
Informal Bid	State will primarily use formal bids. For Small Purchases, the State will use

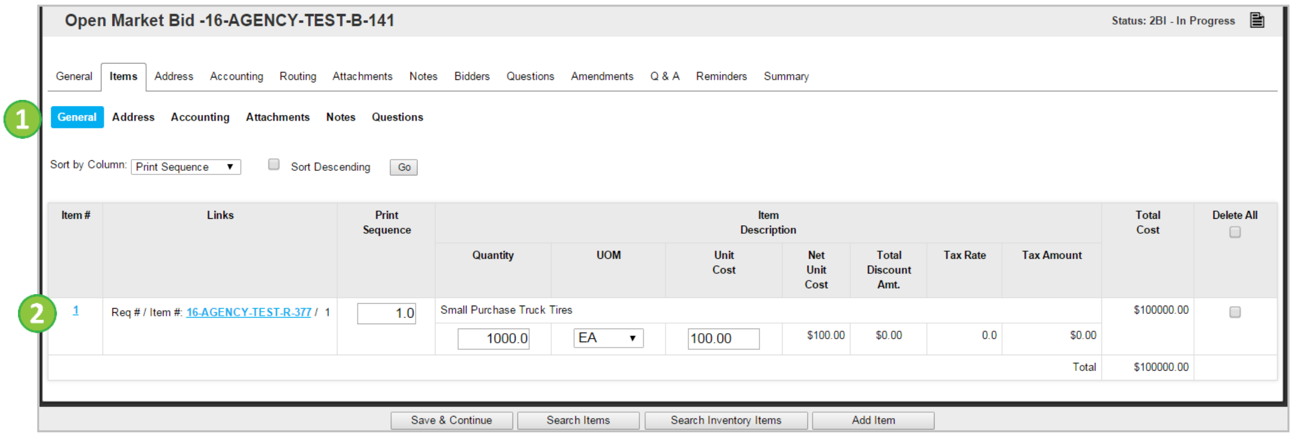
Field Name	Description
	Informal Bids. Formal bids follow the traditional format of: post the bid, vendors produce sealed quotes. The quotes are not public and can only be modified by the vendor who submits it (they can edit or withdraw it any time before the bid opening date.) The sealed bids cannot be opened by the agency prior to the opening date. During the bidding process, the agency can opt to view which vendors have submitted quotes and allow all vendors to see that list. Informal bids, on the other hand, follow the format of: post the bid (as an informal bid), vendors submit quotes that are not sealed and can be seen by the agency in real time.
Control Code	The State will not use
Estimated Cost	Calculated by the system.
Print Dest Detail	Using the dropdown menu, select the print destination address if different from location address.
Alternate ID	An extra field to be used at your discretion. This field is searchable.
Purchase Method*	Select Open Market, using the dropdown menu, for Small Purchase. Selecting either Contract or Blanket adds three additional fields: Catalog ID, Begin Date and End Date of Contract or Blanket. Blanket=releases, no funding attached to Blanket. Open Market = no releases, funding required. **The State will not use Contract Type or Catalog ID.**
Tax Rate	The State will not use tax rate.
Print Format*	Use default Bid Print New = Using the dropdown menu, select an Agency defined print format for this bid.
Enable Rolling Enrollment	Not used for Small Purchase Bids
Enable Open Enrollment	Not to be used by State.
Solicitation Enabled	Not to be used by State.
Info Contact	Enter the contact information of the individual who can be contacted for bid information.
Pre-Bid Conference	Enter details of pre-bid conferences, seen by vendors. Free form field up to 250 characters including spaces.
Bulletin Desc	Adds additional text to vendor notification email. Free form field up to 500 characters including spaces.
Quote Notification	Check if the purchaser wishes to receive an email notification that a bidder has submitted an electronic bid. To use this field, Standard Text, QUOTE_SUBMITTED_NOTIFICATION_TO_PURCHASER must exist and be active, as maintained by an Internal Administrator.
Date Last Updated	System updated with the date of the last update made to the bid.
User last Updated	System updated with the user's name who last updated this bid.
Catalog ID	Not used by State.
Begin Date	If Blanket, select begin date for Blanket. This is the date when assigned Agencies can begin to create Releases off the Blanket. This can be updated at the Purchase Order.
End Date	If Blanket, select end date for Blanket. This is the date when assigned Agencies can no longer create Releases off the Blanket. This can be updated at the Purchase Order
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

Items Tab

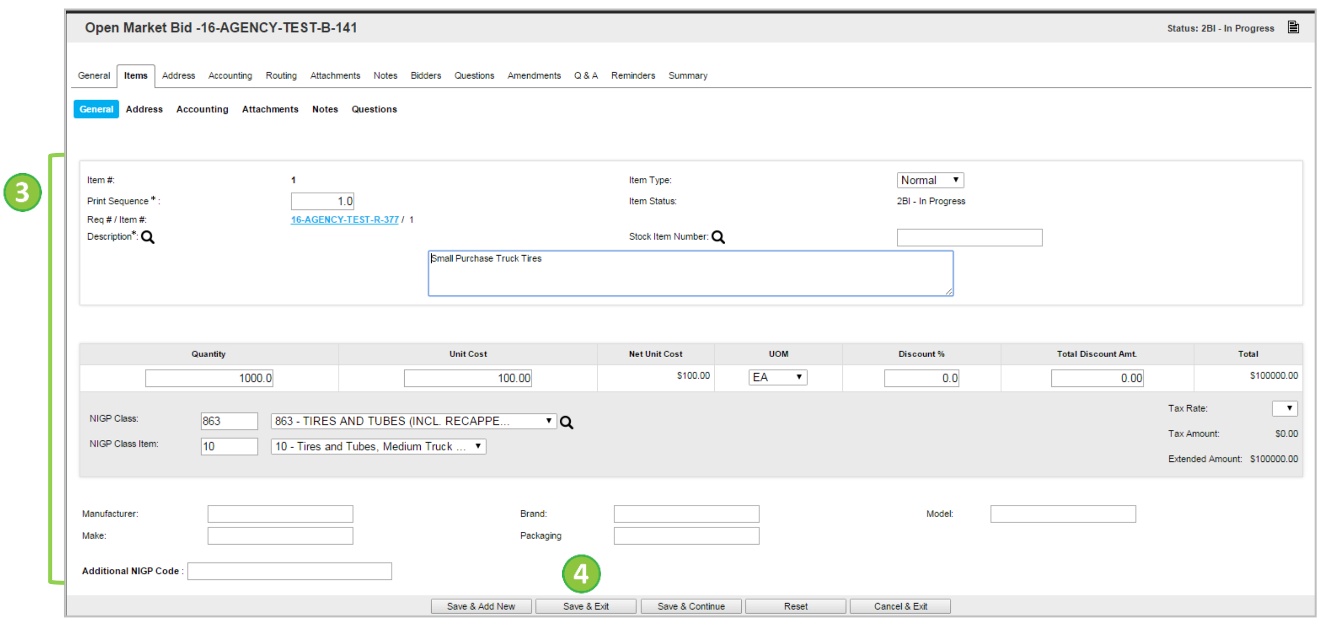
The Items Tab allows users to add or delete items and add narratives to the bid. When creating a document from scratch, the Items tab is blank.

Items Tab: General

1. Select **Items** tab to review items in converted Req
2. Click **Item #** to update item information

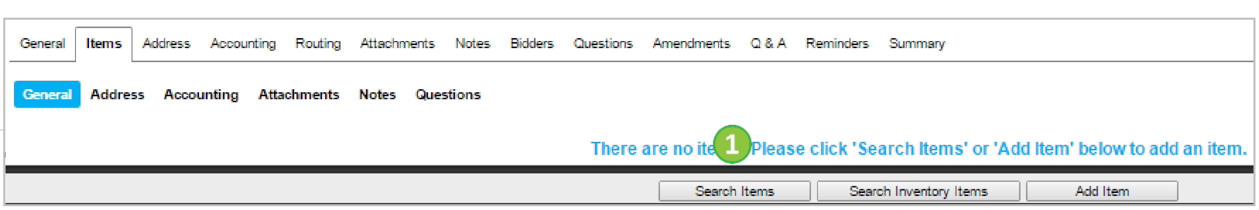


3. Update item information
4. Click **Save & Exit**



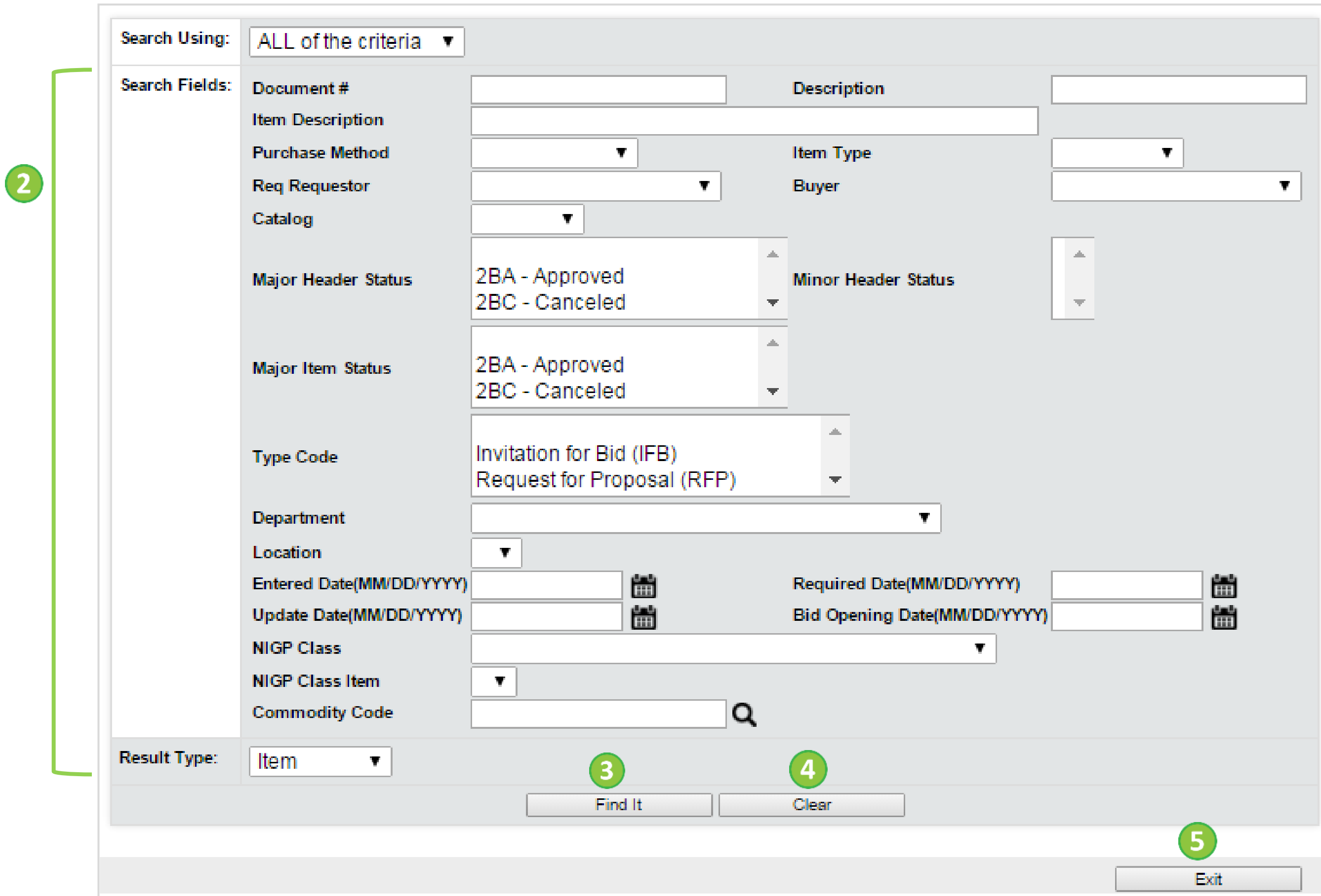
Add Items to Bid using Search Items

1. Click **Search Items**



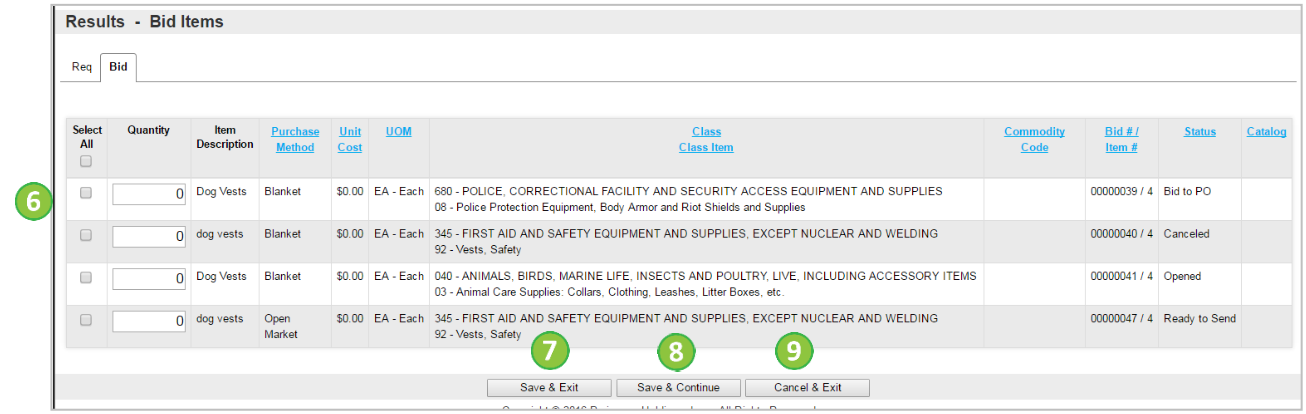
If Bid comes from a Requisition or is cloned from a previous document, items will already be listed.

2. Enter search criteria in screen below
3. Click **Find It**
4. Click **Clear** to empty all entered values
5. Click **Exit** to return to Items tab without selecting an item



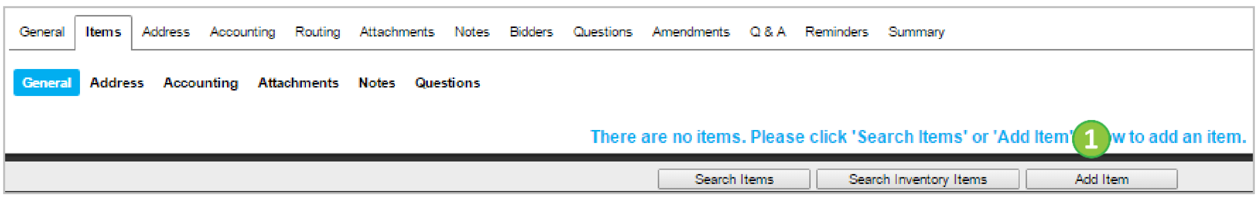
6. Select item to add and enter a value for **Quantity**
7. Click **Save & Exit** to add and exit
8. Click **Save & Continue** to add more items

9. Click **Cancel & Exit** to cancel selections



Add Items to Bid using Add Item

1. Click on **Add Item**

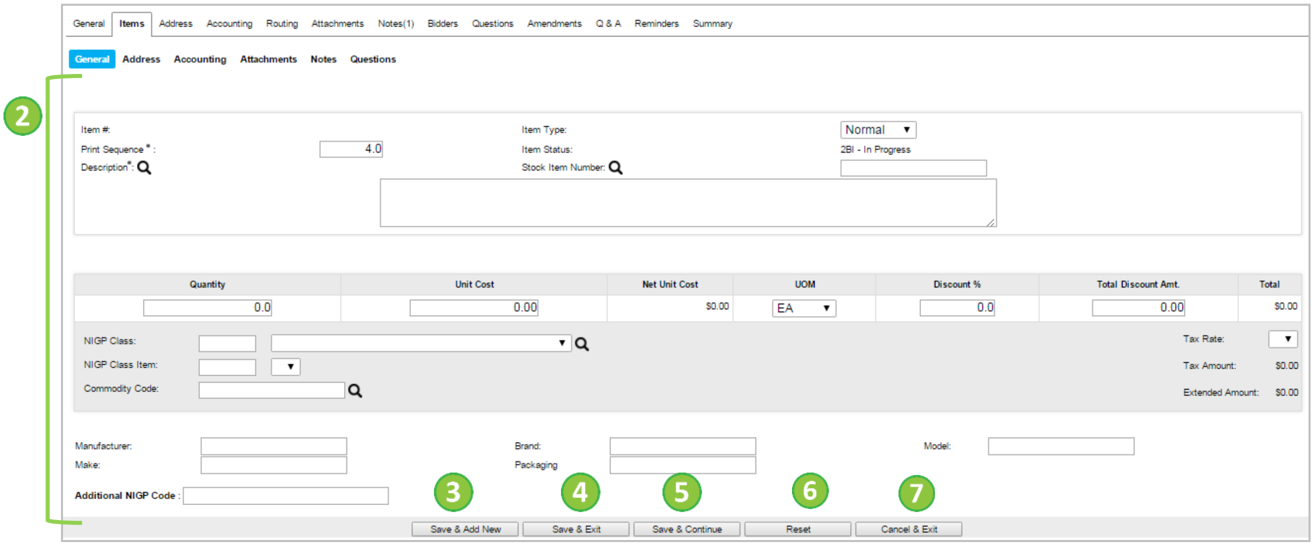


2. Enter item information
3. Click **Save & Add New** to save item and create another new item
4. Click **Save & Exit** to save item to Bid and return to Bid screen(can add additional items later)

> **See Bid Item Field Descriptions Table. All fields with an Asterisk * are required.**

5. Click **Save & Continue** to save with option to continue entering this item's detail
6. Click **Reset** to clear all fields before saving

7. Click **Cancel & Exit** to end the process creating an item



Bid Items Field Descriptions

Field Name	Description
Item #	The order in which items are entered and are sequentially done by BidBuy. This field cannot be modified by the user. Build Renewal Options as separate line items to get option year pricing.
Print Sequence*	Required. The order in which the items will be displayed. This will be defaulted by BidBuy to match item #, and can be modified by the user
Item Type	Normal refers to a procurable item or good. Selecting Narrative will make it a non-orderable addition where the user can type in text to appear on the Bid.
Item Status	Current status of line-item.
Description*	Required. As defined by the user. Use complete words, not abbreviations. Start with NIGP description, and then add more detailed information. Minimum information required by approvers. Provide enough information for Vendor to understand how to respond, including any special instructions.
Quantity	The amount of the item that is needed
Unit Cost	An estimated unit cost per item
Net Unit Cost	This amount is calculate by the application
UOM	Select a unit of measure from the drop-down menu. **See Appendix A: Unit of Measure Descriptions, page 122.**
Discount %	Percentage discount applicable to the item
Total Discount Amt.	The Total Discount Amount, based on the Discount %. This value is calculated automatically by the system based on the Discount % value entered by the user. The value will not appear until the user tabs out of the Discount % field. The user can also manually type in a discount amount without entering a Discount %. The value must be negative for it to be deducted from the total.
Total	The Total Cost before tax. This value is calculated automatically. The formula used is: (Quantity x Unit Cost) = Total Discount Amount. The user cannot edit this field.

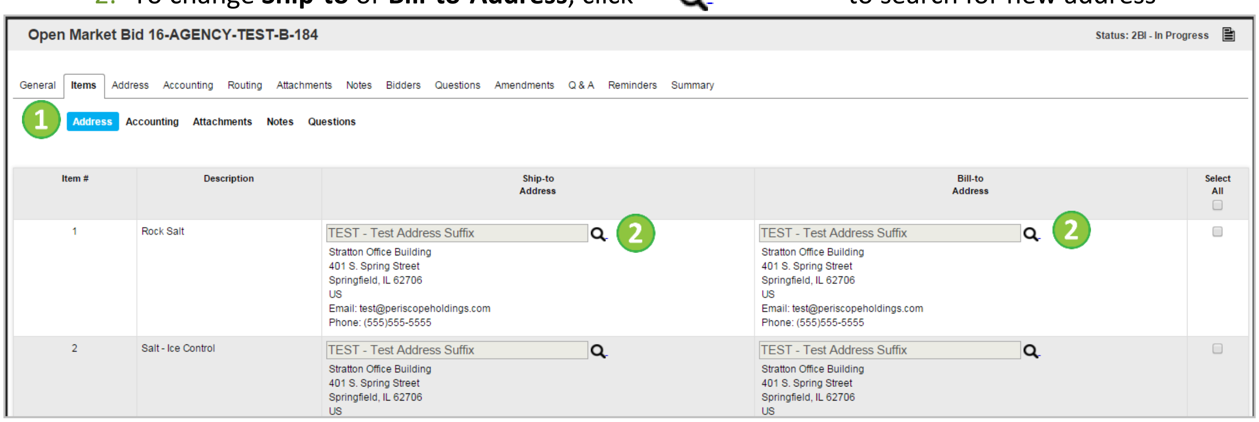
Field Name	Description
NIGP Class*	Required. The three-digit Class Code associated with the item. NIGP codes will be required for all items in the system. One code per line item.
NIGP Class Item*	Required. The two-digit Class Item associated with the item
Commodity Code	Completes the 11-digit NIGP Code
Tax Rate	Not used by State
Tax Amount	Not used by State
Extended Amount	The Total Extended Amount of the item. This value is calculated automatically. The formula used is: Total + Tax Amount+ Freight. The user cannot edit this field.
Manufacturer	Optional field
Brand	Optional field
Model	Optional field
Make	Optional field
Packaging	Optional field
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

Items Tab: Address

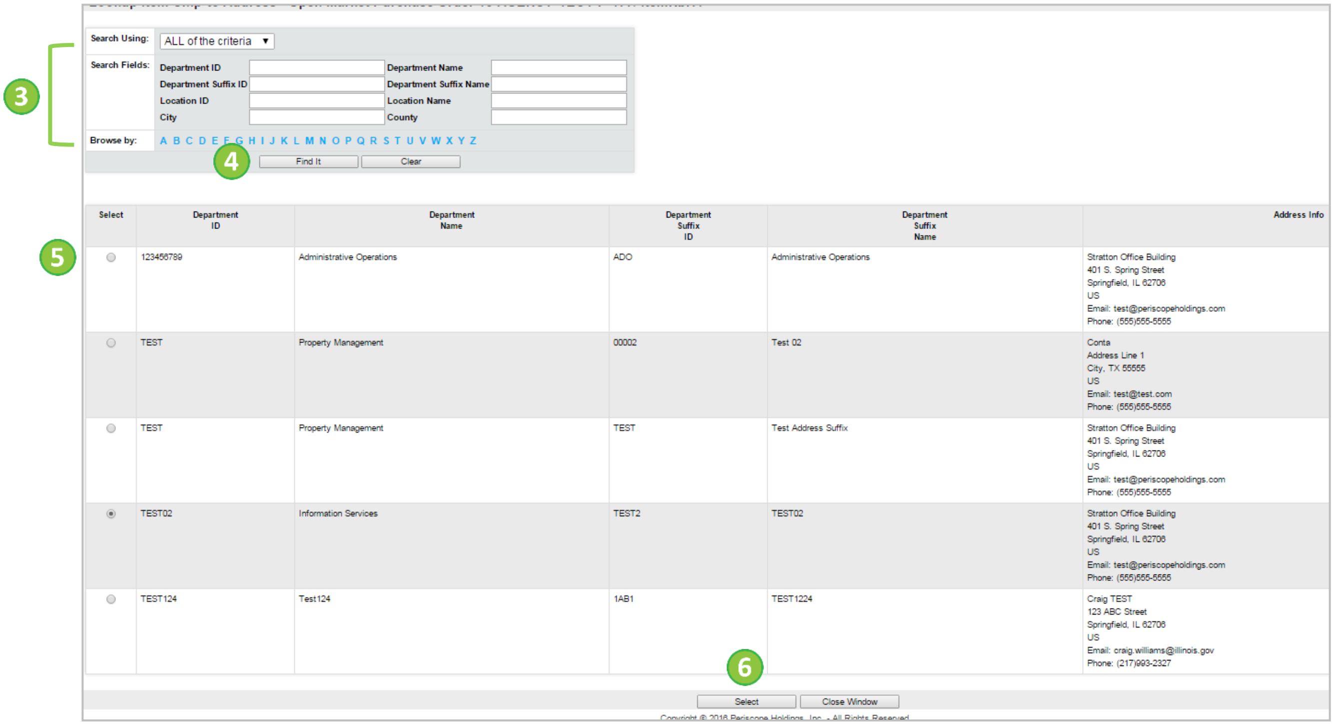
This allows shipping and billing addresses for specific items. To assign shipping and billing addresses for all items go to the main Address tab for the bid. Typically, this would not be changed because it is the Requestors Address, not the buyers.

Default address information from the item master displays

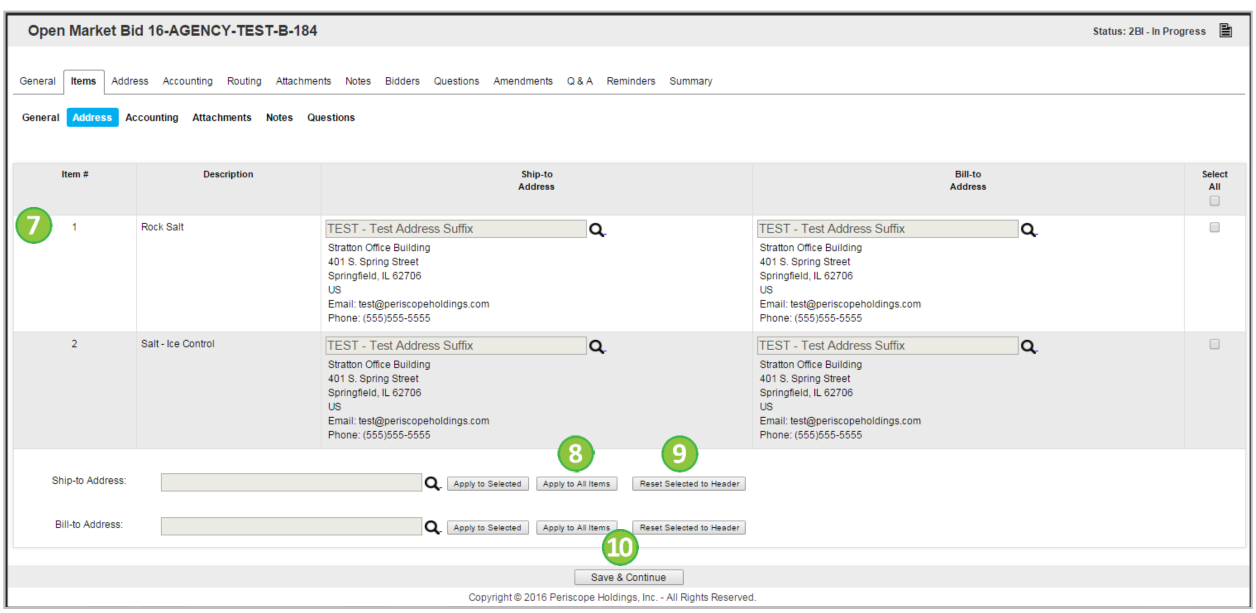
1. Select **Address** sub-tab
2. To change **Ship-to** or **Bill-to-Address**, click to search for new address



3. Enter Search Criteria
4. Click **Find It**
5. Select a new address
6. Click **Select** to update address



7. Select item(s) to change address (Ship/Bill To Address)
8. Click **Apply to Selected** to apply changes to only selected items or click **Apply to All Items** to apply changes to all items
9. Click **Reset Selected to Header** to reset all addresses to default from Item Master
10. Click **Save & Continue** to save changes and continue



New address must be saved before using the Apply Ship-to or Apply Bill-to function

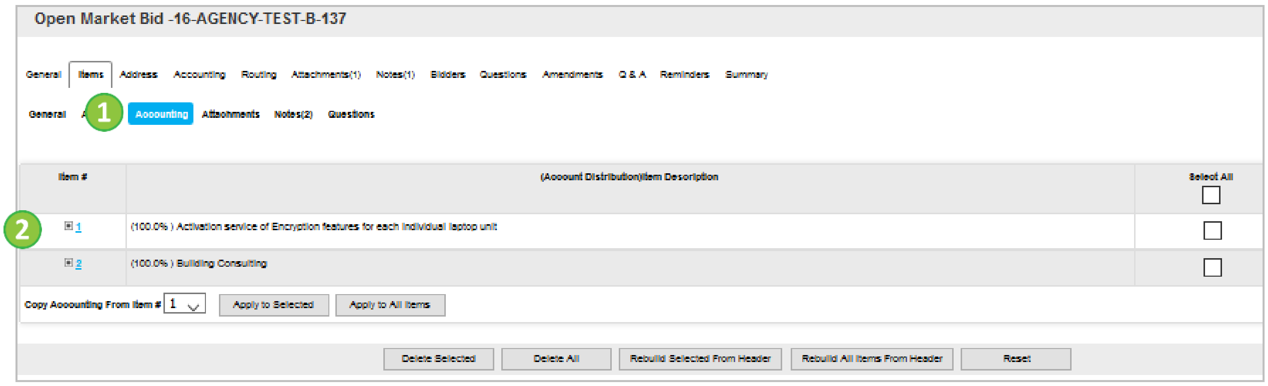
Items Tab: Accounting

The Item's Accounting sub-tab allows you to enter accounting information for specific items. To add the same accounting information to all items, go to the main Accounting tab for the Bid.

1. Select **Accounting** sub-tab

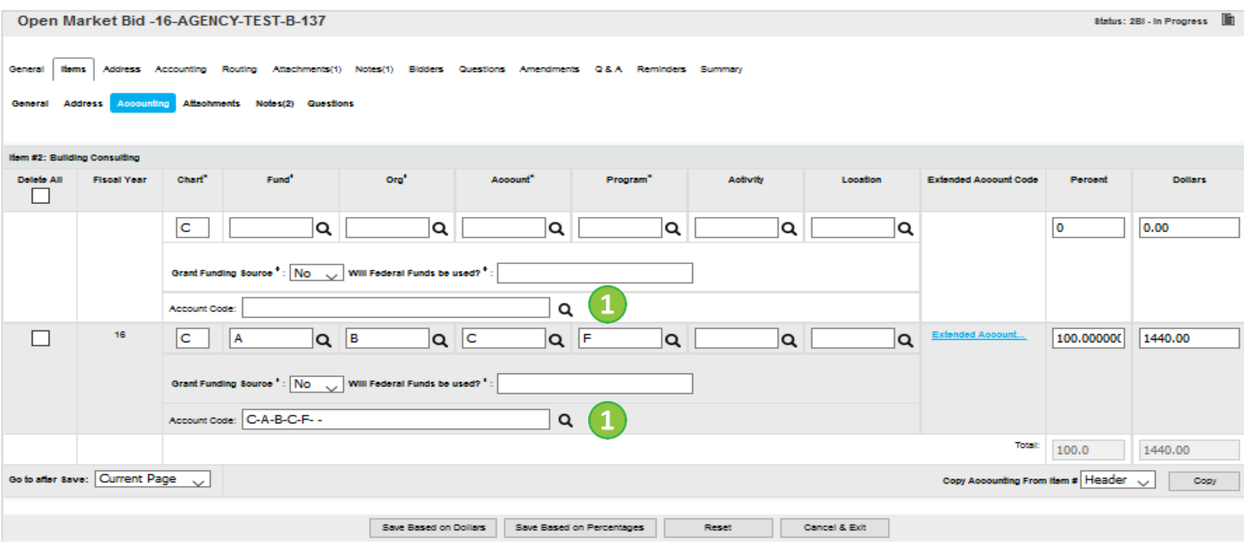
> **Default accounting information from the item master displays**

2. Select **Item #** to update accounting information

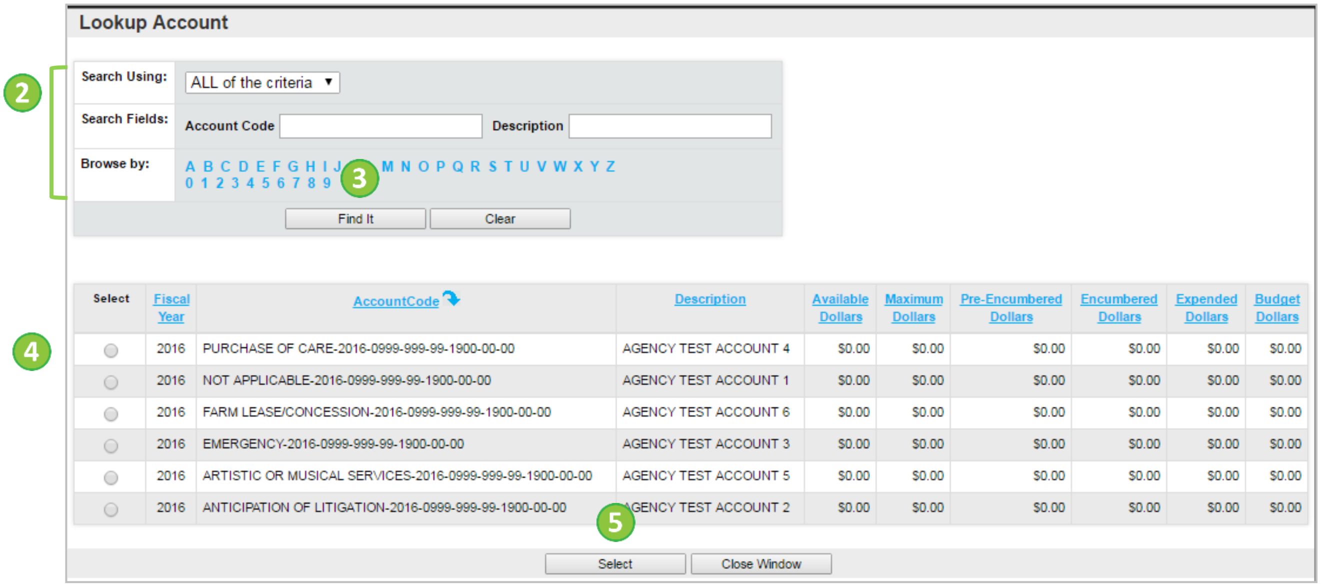


Add or change Account Code

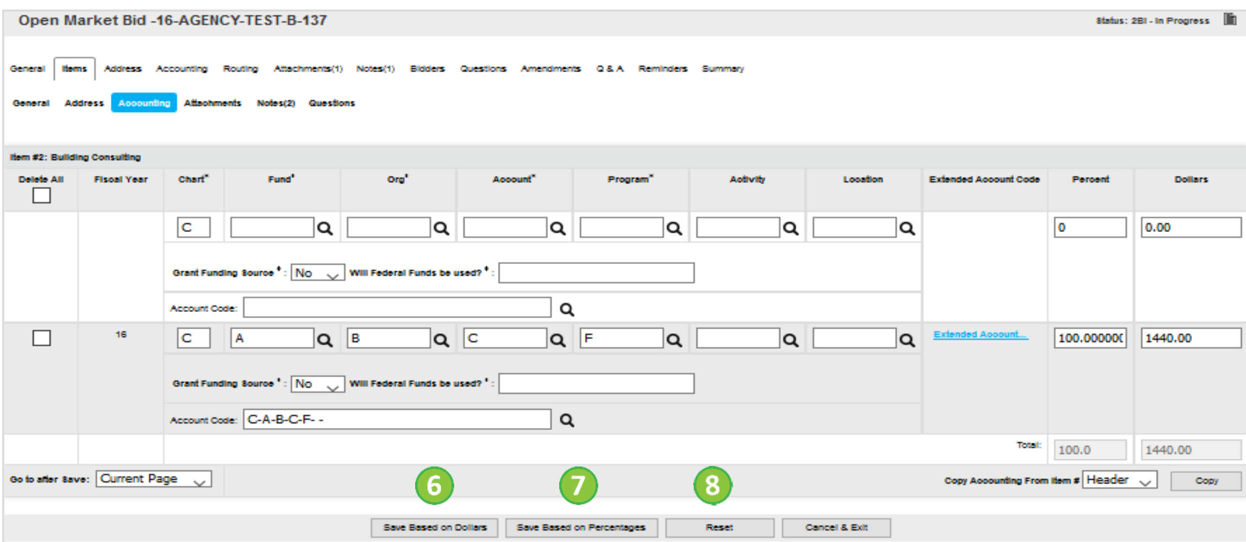
1. Click 🔍 to search for **Account Code**



2. Enter search criteria
3. Click **Find It**
4. Select **Account Code**
5. Click Select



6. Click **Save Based on Dollars –** to save based on dollar amount entered, or
7. Click **Save Based on Percentages –** to apply changes and save based on percentages entered
8. Click **Cancel & Exit** to exit without saving

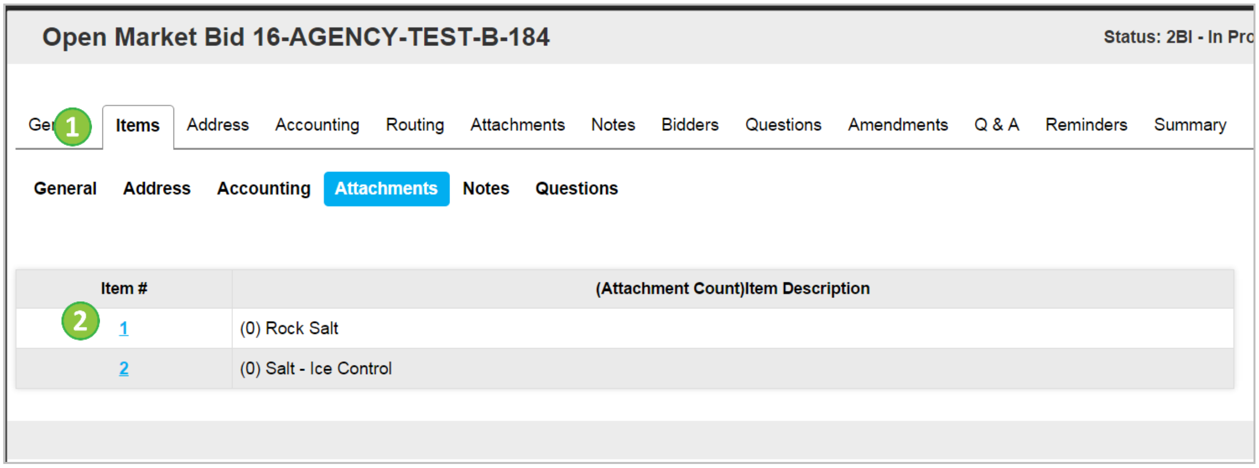


Items Tab: Attachments (Not used by the State)

The attachments sub-tab allows you to add attachments to specific items. Attachments and forms can also be added to the overall bid from the main Attachments tab.

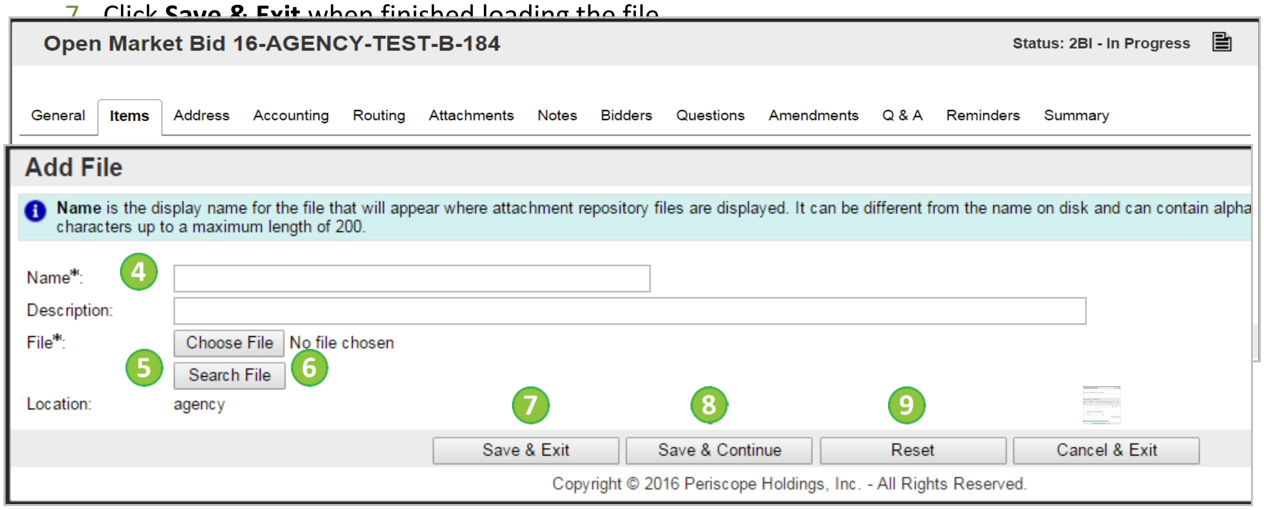
1. Select **Attachments** sub-tab

2. Click **Item #** for attachment



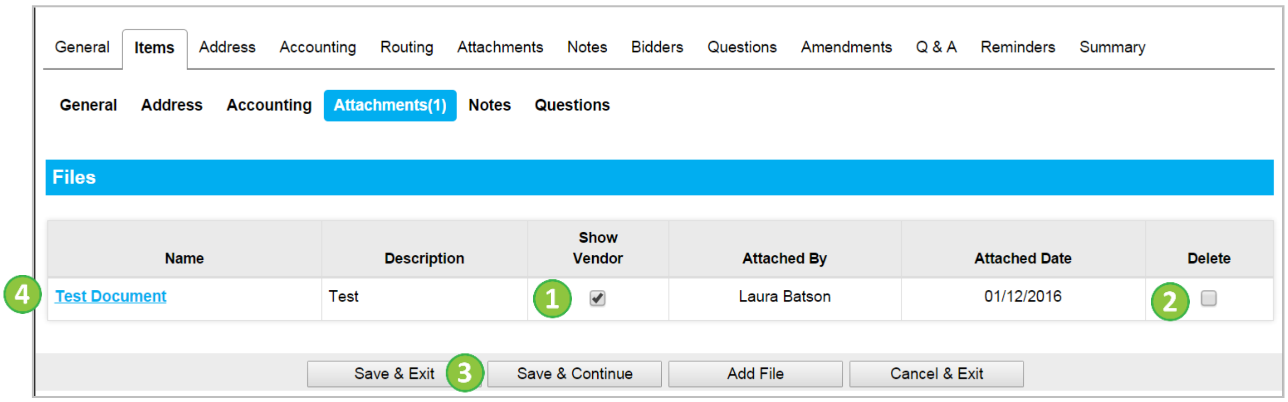
3. Click **Add File** to add attachments

4. Add file **Name** and **Description**
5. Click **Choose File** to browse your computer for a file
6. Click **Search File** to search for a specific file on your computer
7. Click **Save & Exit** when finished loading the file

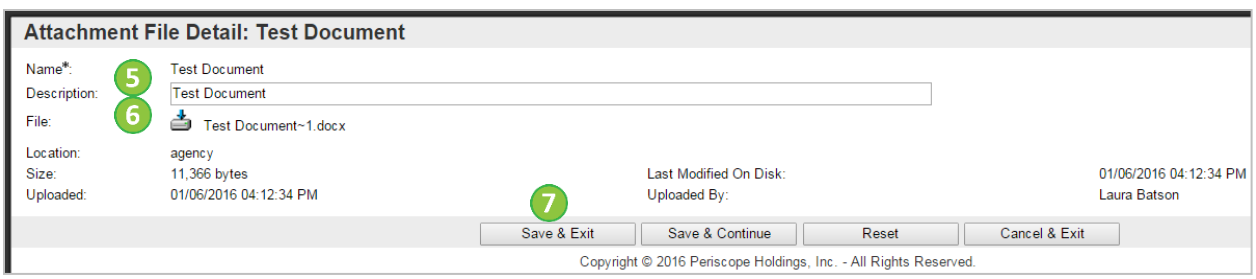


Update Item Files

1. Select **Show Vendor** to show to all vendors
2. Select **Delete** to delete attachment
3. Click **Save & Continue** to save changes
4. Click **Name** to update Description or download attachment



5. Update **Description**
6. Download file, click 
7. Click **Save & Exit**



Other information must be updated by deleting and adding a new file.

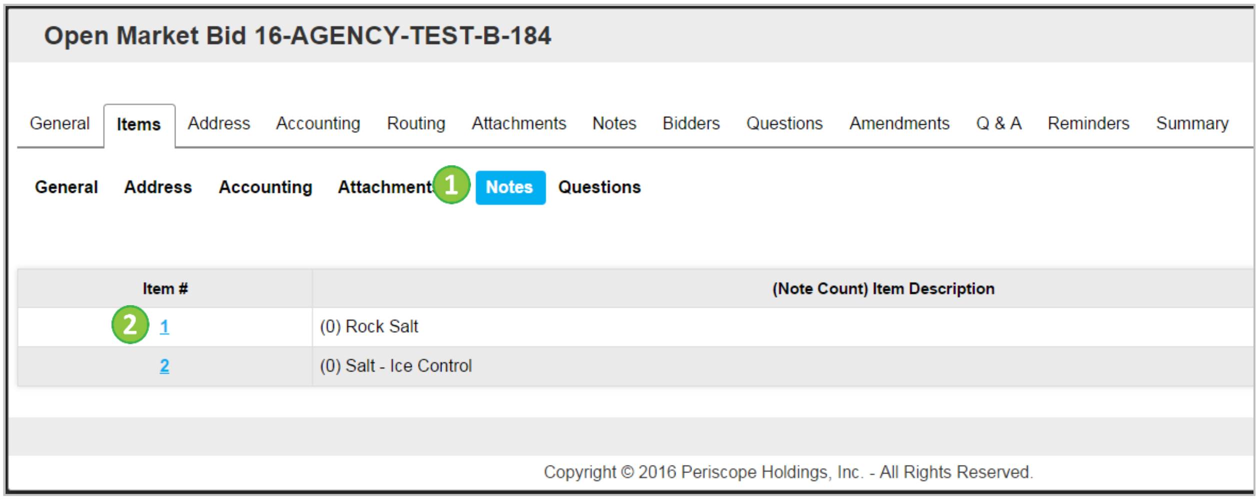
Items Tab: Notes

This notes section allows the user to add notes to specific items. To add notes to all items, go the main Notes tab for the bid. A note is similar to a post-it note as an internal communication.

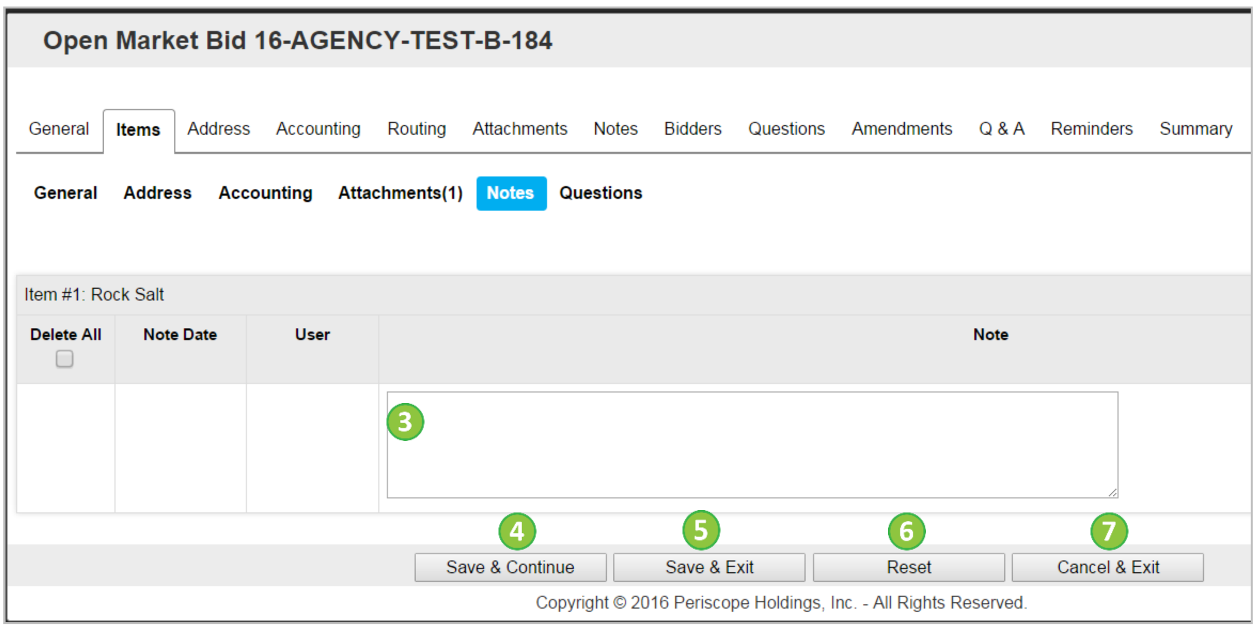
Enter Notes for Specific Items

1. Select **Notes** sub-tab

2. Click **Item #** to add notes to that item



3. Update notes
4. Click **Save & Continue** to save notes and continue adding more notes
5. Click **Save & Exit** to add note and exit to PO
6. Click **Reset** to reset screen display
7. Click **Cancel & Exit** to exit without saving



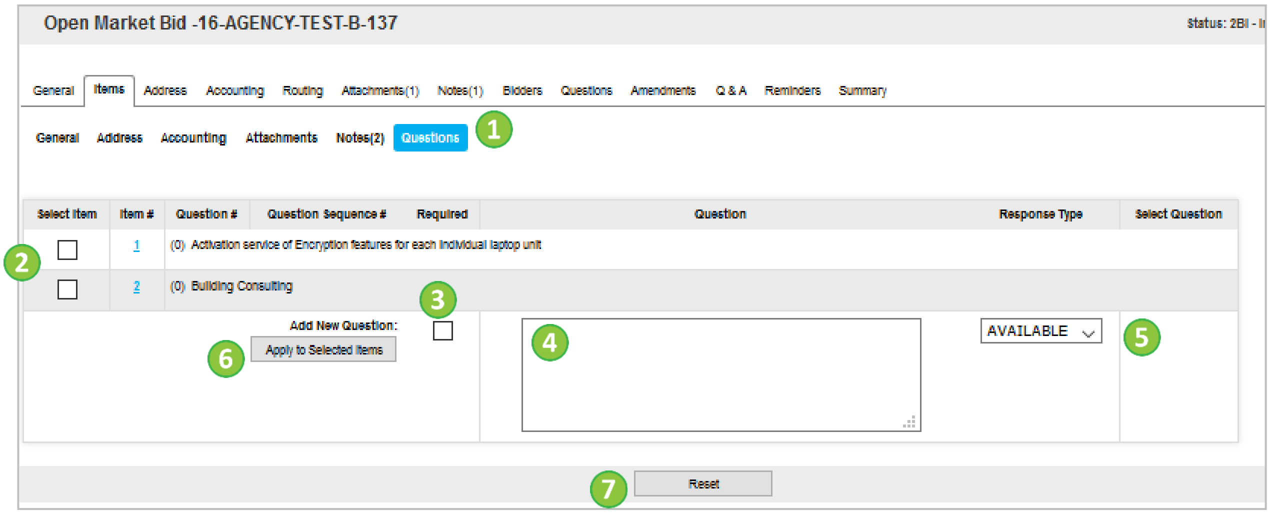
Items Tab: Questions (Not used by State)

The Questions tab allows the user to create questions for the vendor to answer with a specified response type when responding electronically to the bid. To add questions to apply to all items, go the main Questions tab for the bid.

1. Select **Questions** sub-tab
2. Click **Select Item** to add a question to a specific item
3. Select **Required** if this question is required for the vendor to respond
4. Enter the question

See Bid Question Field Descriptions. All fields with an Asterisk * are required

5. Select **Response Type** from drop-down
6. Click **Apply** to **Selected** Items to add the question to the item(s) selected. To remove a question after it is added, click on Item #, Select 'Delete' or 'Delete All' then 'Save & Exit'
7. Click **Reset** to reset fields



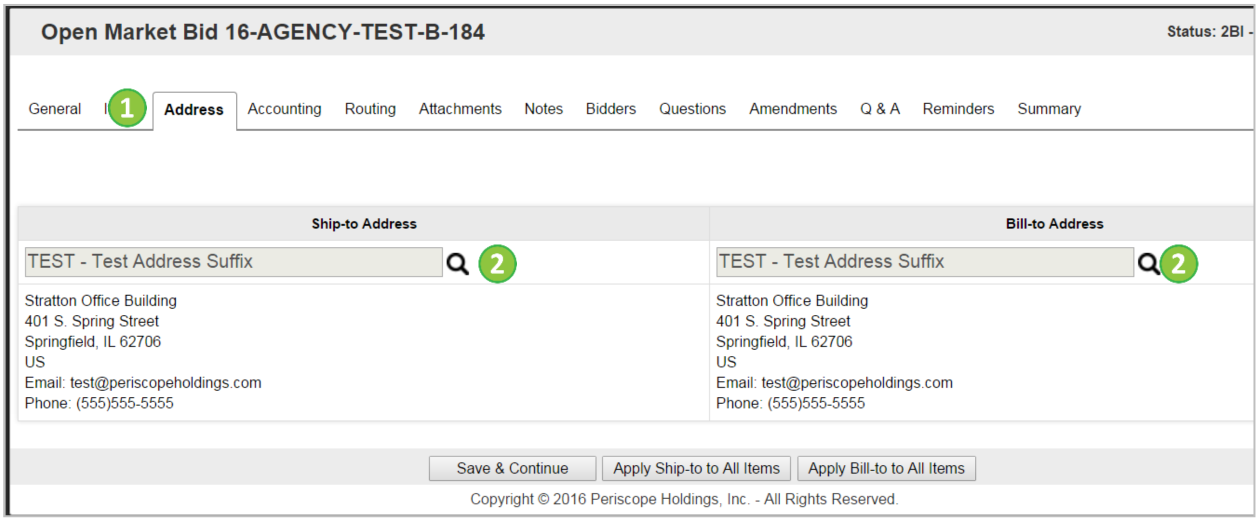
Bid Question Response Type Descriptions

Field Name	Description
Available	Availability response
Average	Average rating - poor to excellent
Comment	Comment response - extended text
Scale10	Rating scale from 1 to 10
Scale15	Rating scale from 1 to 5
Text	Basic text response
True False	True or False Response
Yes No	Yes or No Response

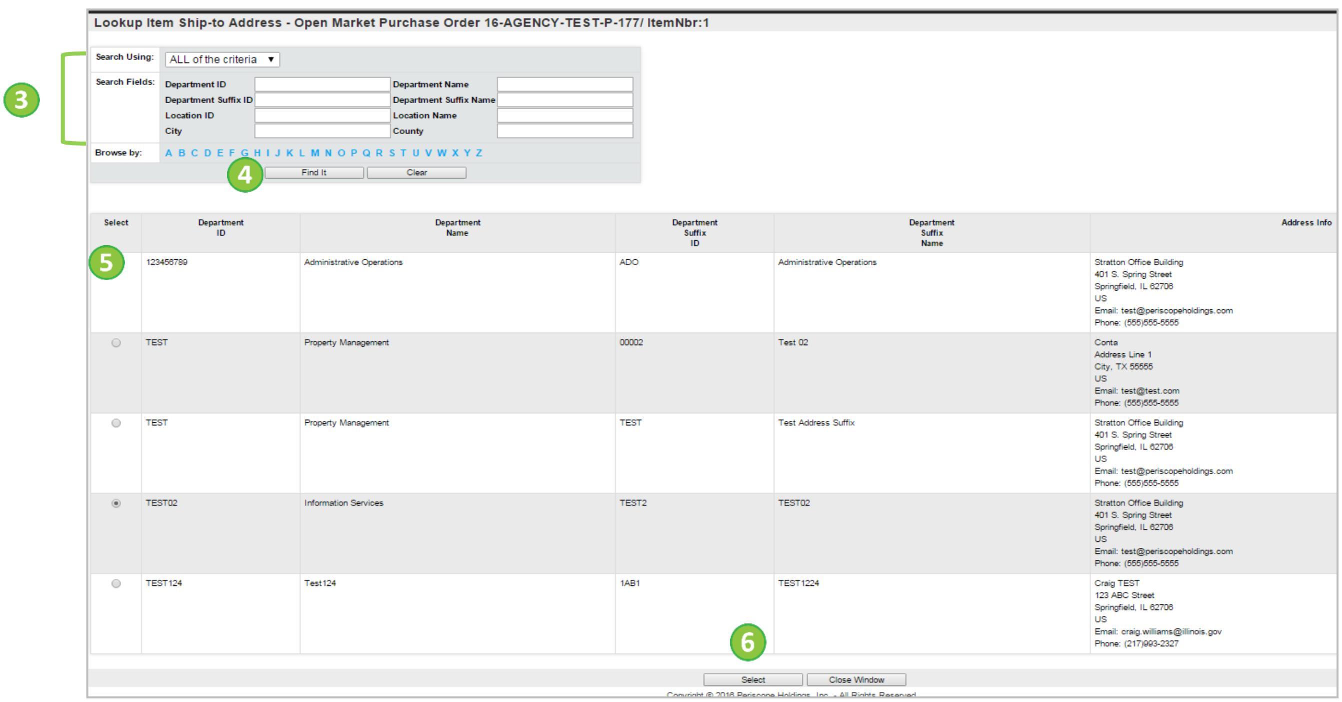
Address Tab

The Bid Address tab is auto populated with the Ship-to Address and Bill-to Address from the Requisition. If the buyer starts the Bid document from scratch, the Ship-to Address and Bill-to Address is auto filled by the default for the user's setting.

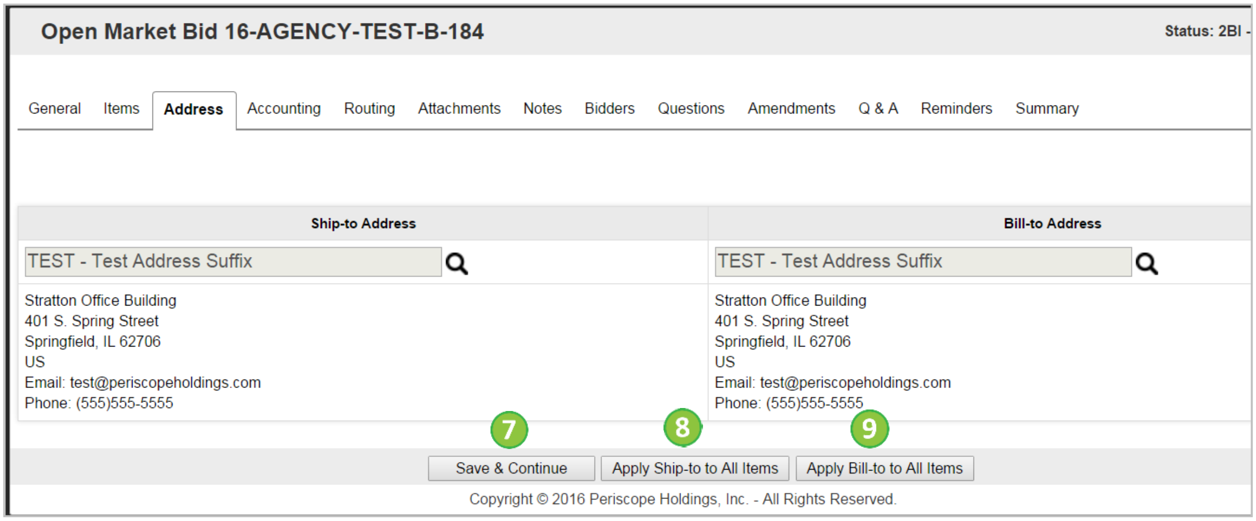
1. Select **Address** tab



2. To change **Ship-to** or **Bill-to-Address**, click to search for new address
3. Enter Search Criteria
4. Click **Find It**
5. Select a new address
6. Click **Select** to update address



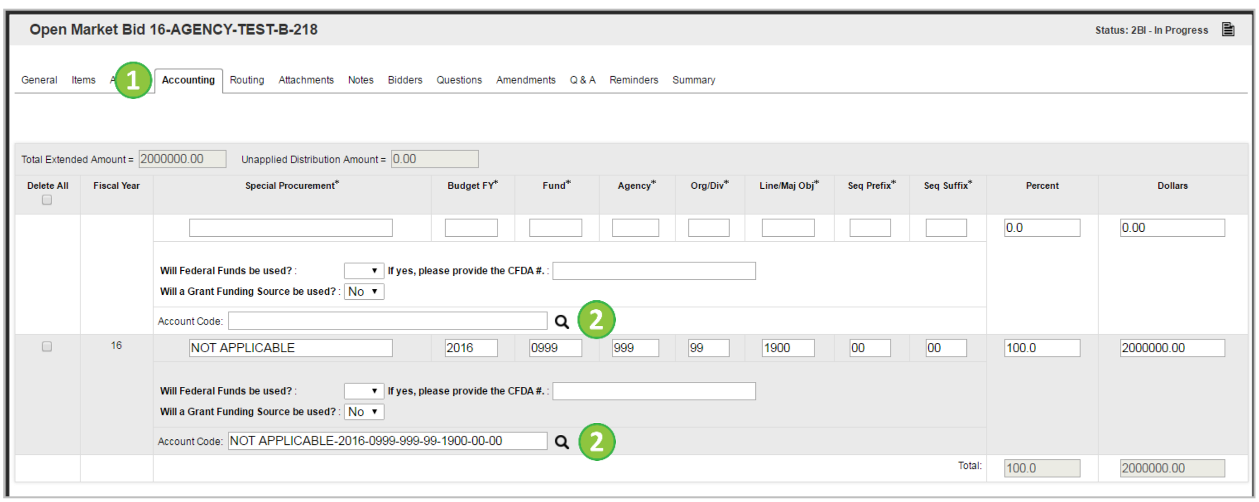
7. Click **Save & Continue** to save changes and continue
8. Click **Apply Ship-to to All Items –** to apply the ship to address changes all items on Bid
9. Click **Apply Bill-to to All Items** – to apply the bill to address changes to all items on Bid



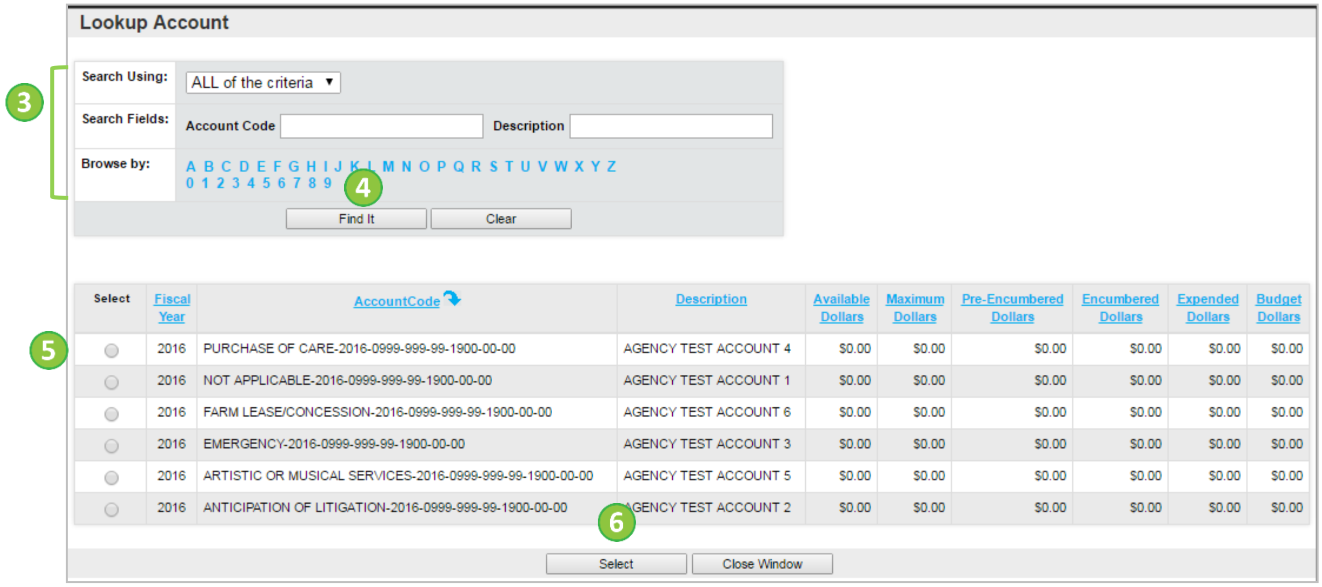
Accounting Tab

This is where you can apply the same accounting information to all items. To itemize accounting go to the accounting sub tab under Items tab.

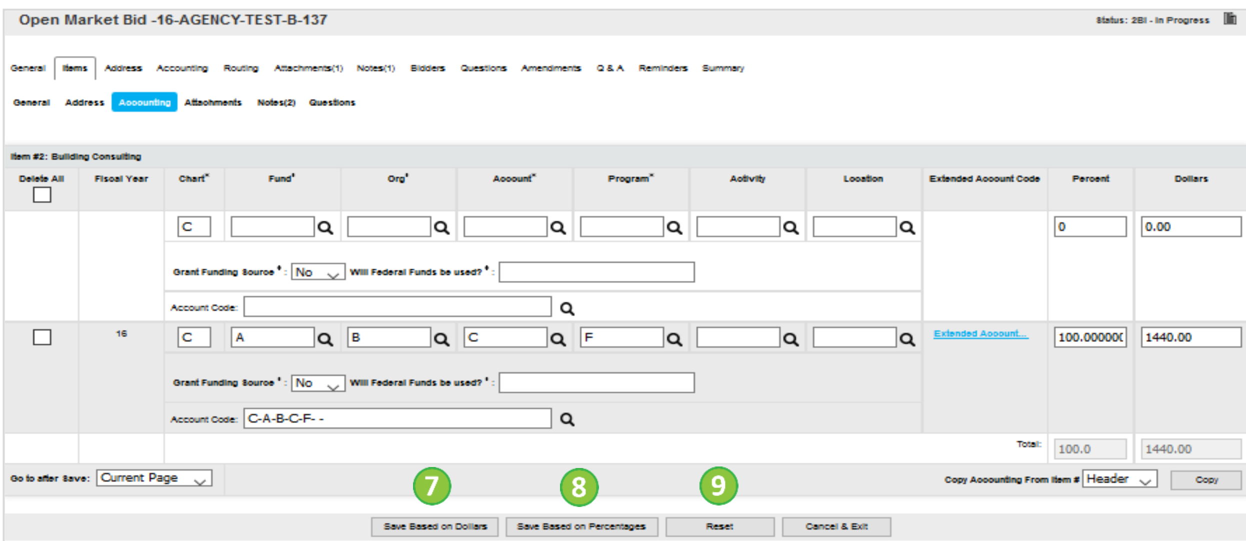
1. Select **Accounting** tab
2. Click to search for **Account Code**



3. Enter search criteria
4. Click **Find It**
5. Select **Account Code**
6. Click Select



7. Click **Save Based on Dollars –** to save based on dollar amount entered, or
8. Click **Save Based on Percentages –** to apply changes and save based on percentages entered
9. **Click Cancel & Exit to exit without saving**

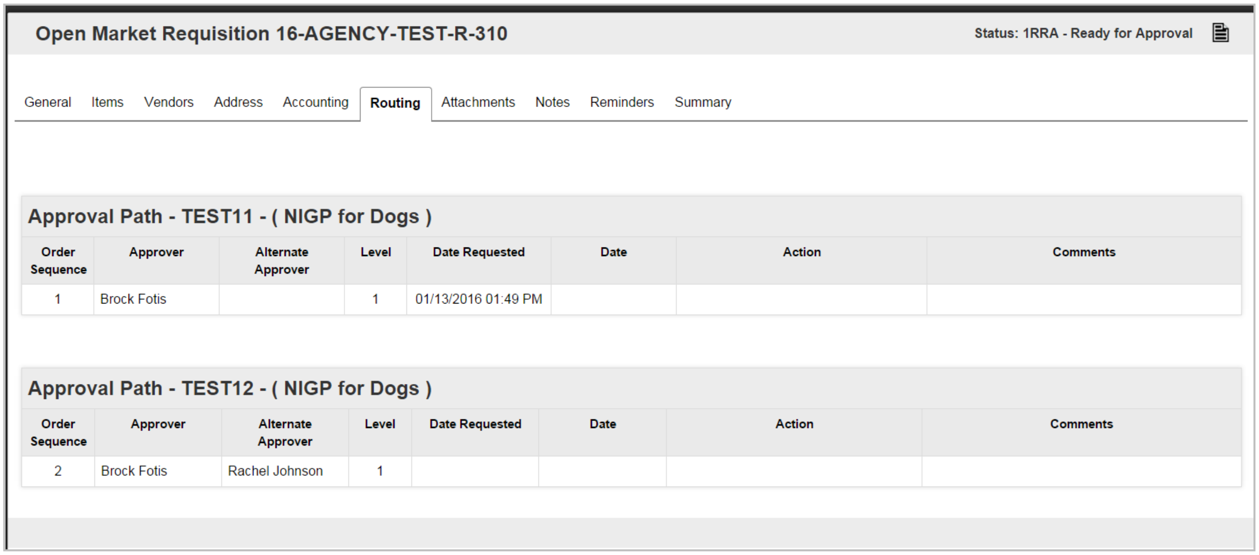


Accounting Field Descriptions

Field Name	Description
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

Routing Tab

The routing that a Bid must follow for approval is determined by the applicable approval paths. The approval path is displayed on the Routing Tab. This tab remains blank until an approval path is determined when the bid is submitted for approval.



Bid Routing Field Descriptions

Field Name	Description
Approval Path (header)	Approval Path ID of applied approval.
Order Sequence	Approval sequence of the approval.
Approver	The names of the approver.
Alternate Approver	The name of the alternate approver(s) associated with the approver.
Level	The level of the approver (the lowest level approves the Bid first).
Date Requested	The date the approver was sent notification to approve the Bid.
Date (Approved/Disapproved/Cancelled)	The date the approver approved, disapproved or cancelled the Bid.
Action	The approval user that approved, disapproved or cancelled the Bid.
Comment	The comment entered by the approver during the approval process.

Attachments Tab

Both files and forms (when Form Builder is enabled) can be attached by the agency (BP user).

Attaching files to BidBuy documents is a useful way to include specifications or other guidelines in procurement documents. The user can attach multiple files such as documents, spreadsheets, memoranda, etc. and can use the **Attachment** Tab to upload the files.

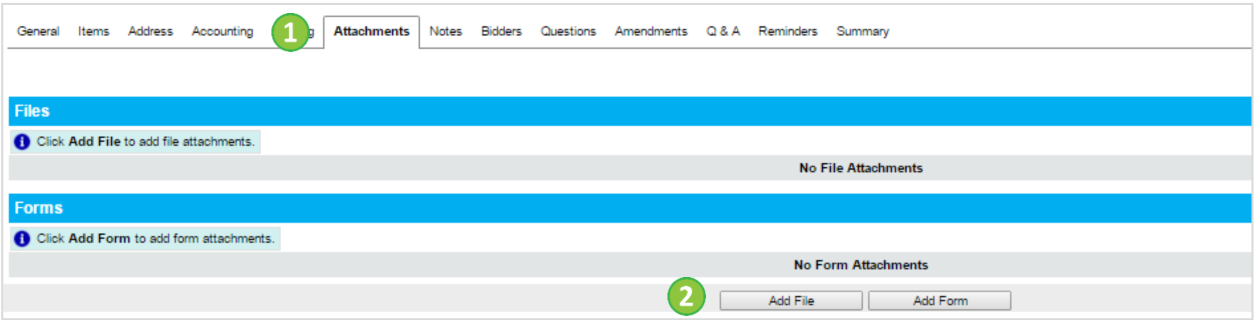
The Add Form button allows the agency to attached predefined published forms **(such as Sole Source Justification)**. Only those forms that are published for the organization (agency) with the specific document type and specific user role can be attached to the specific document.

For form and file information from CMS and the CPO-GS, see the Attachment Appendix.

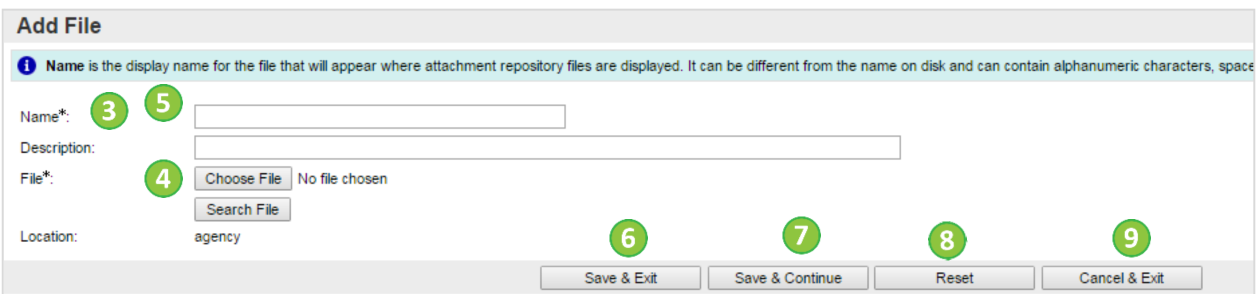
Add a File

1. Select **Attachments** tab

2. Click **Add File**

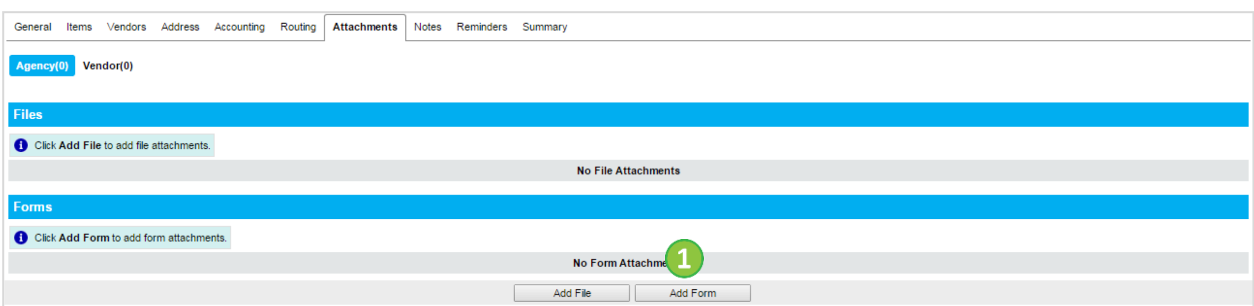


3. Add file **Name** and **Description**
4. Click **Choose File** to browse the computer for a file
5. Click **Search File** to search in the repository
6. Click **Save & Exit** when finished loading the file
7. Click **Save & Continue** to save changes made and remain on the same screen
8. Click **Reset** – to reset display before saving
9. Click **Cancel & Exit** to exit without adding any files



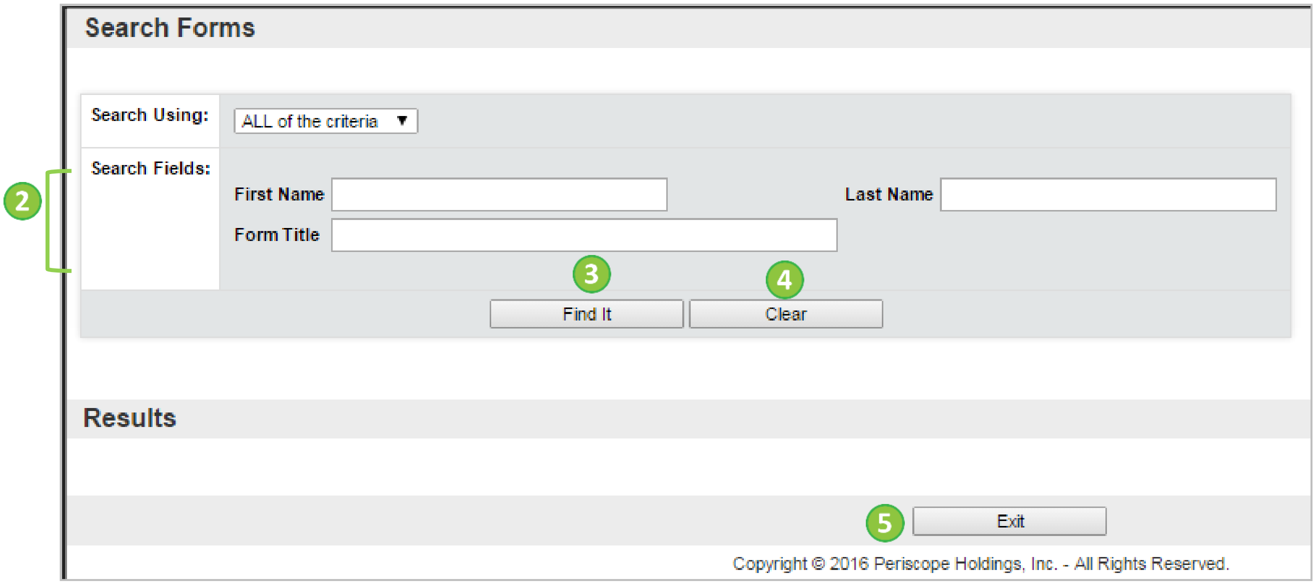
Add a Form

1. Click **Add Form**

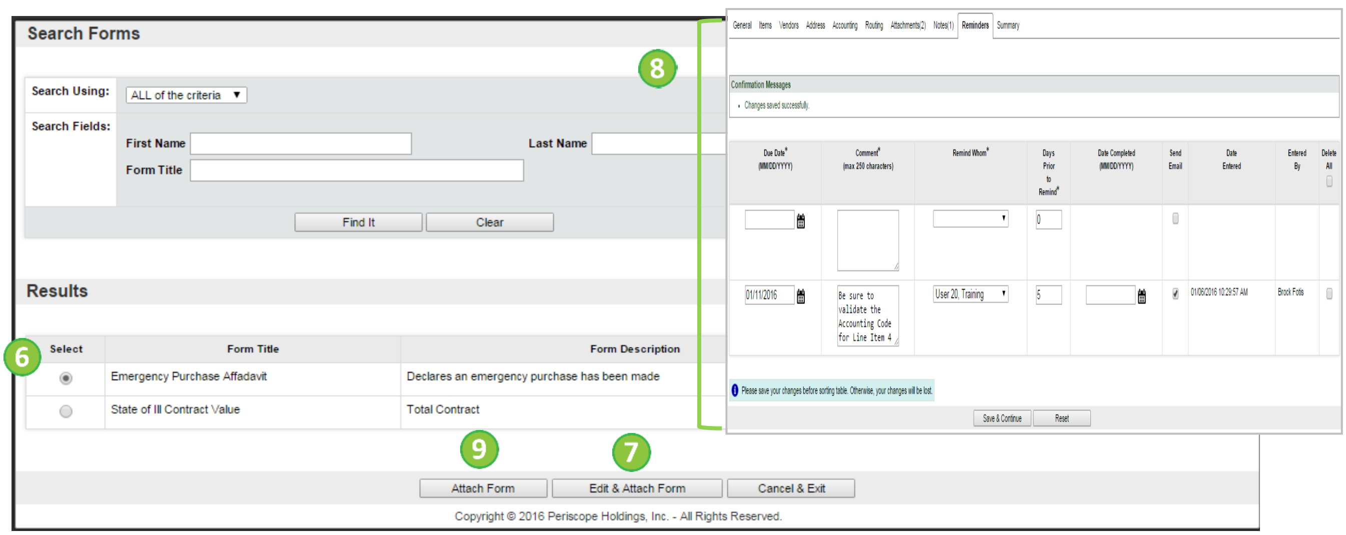


2. Enter **search criteria** or leave blank to return all forms
3. Click **Find it** to find form
4. Click Clear to restart search

5. Click **Exit** to exit



6. Select **radio button** for Form Title
7. Click **Edit & Attach** Form to edit form and attach to Bid
8. Enter **form information**, then click Save and Exit buttons
9. Click **Attach Form** to Bid

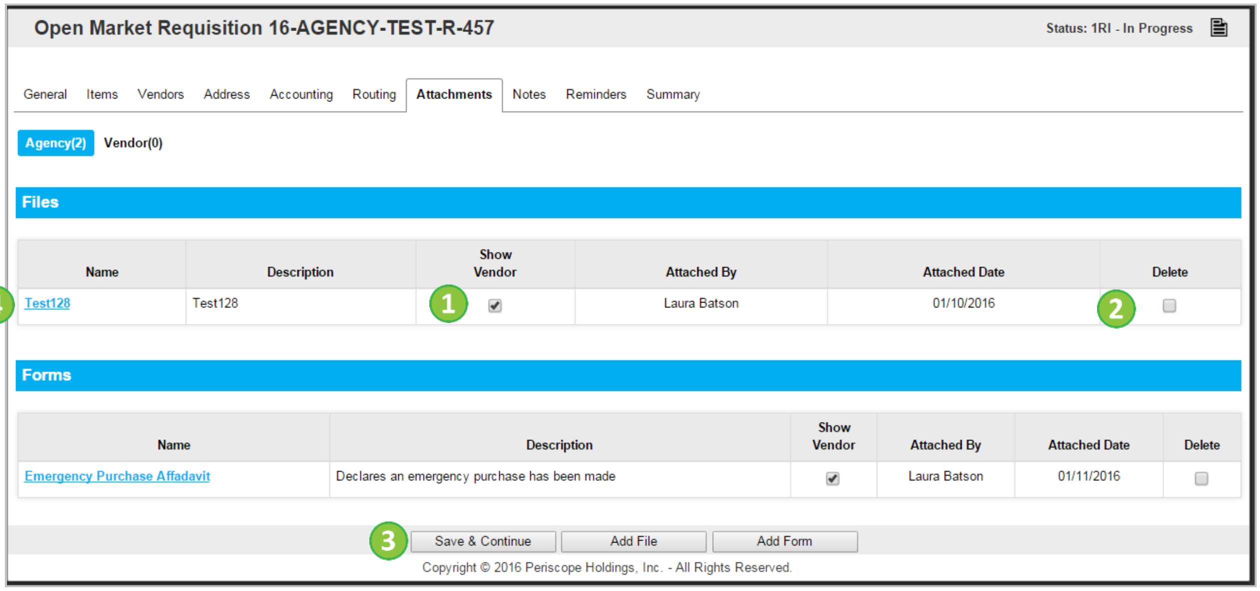


Update Files

Attachments can be added and deleted. To update a specific attachment, you need to update the file outside BidBuy, then delete the old one and add the new one.

1. Select **Show Vendor** to show to all vendors
2. Select **Delete** to delete attachment
3. Click **Save & Continue** to save changes

4. Click **Name** to update **Description** or download attachment



5. Update **Description**
6. Download file, click
7. Click **Save & Exit**

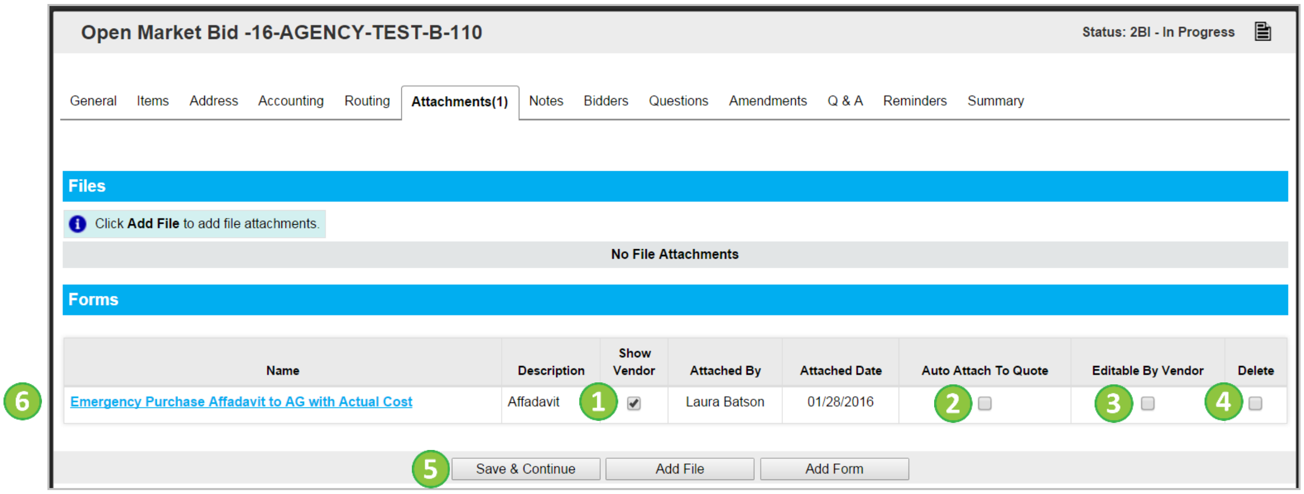
Other information must be updated by deleting and adding a new file

Update Forms

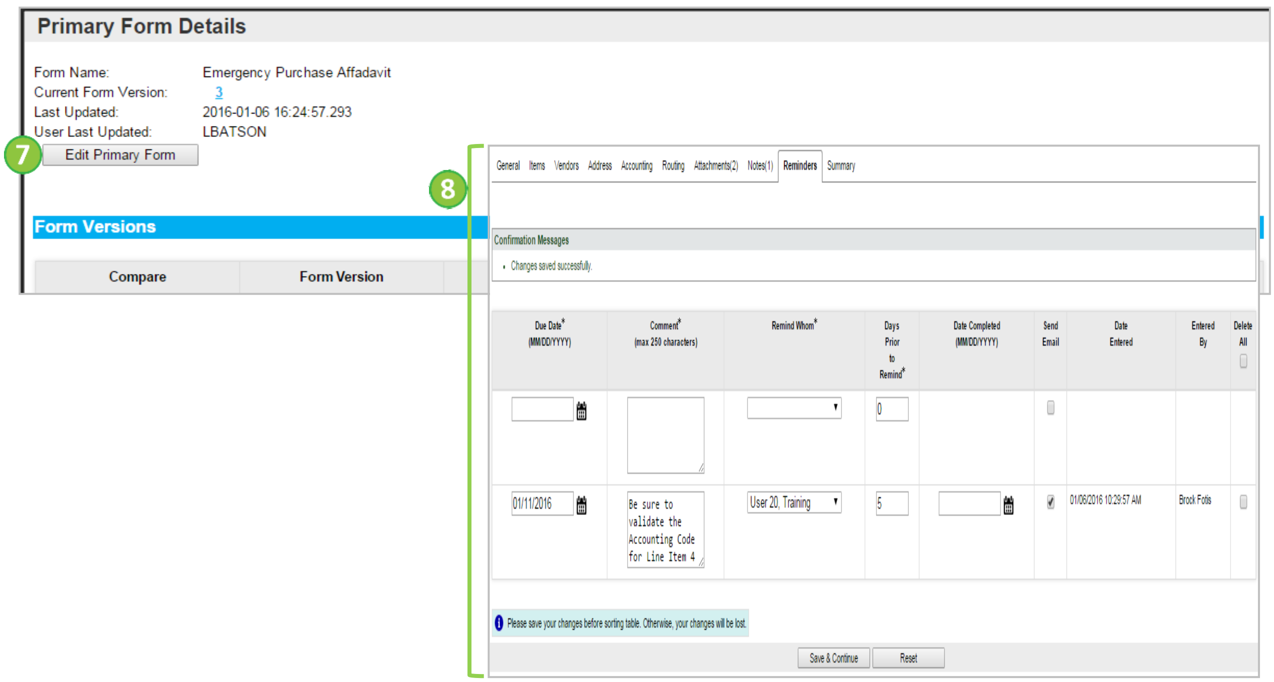
Forms can have multiple versions. If anything is added to a form, it then become the primary form.

1. Select **Show Vendor** to show to all vendors
2. Select **Auto Attach to Quote** to attach the form to the quote
3. Select **Editable By Vendor** to allow vendors to edit the form
4. Select **Delete** to delete form
5. Click **Save & Continue** to save changes

6. Click **Name** to view and modify form



7. Click **Edit Primary Form** to update form



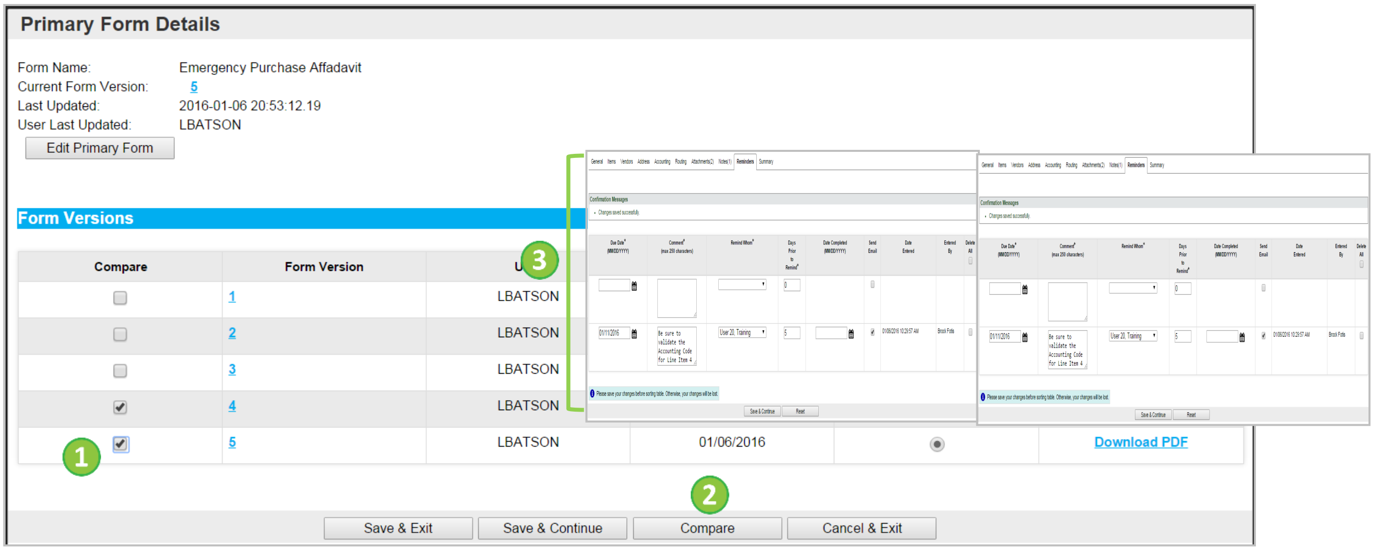
8. Update form information, then click **Save and Exit**

> **The updated form defaults as the Primary form.**

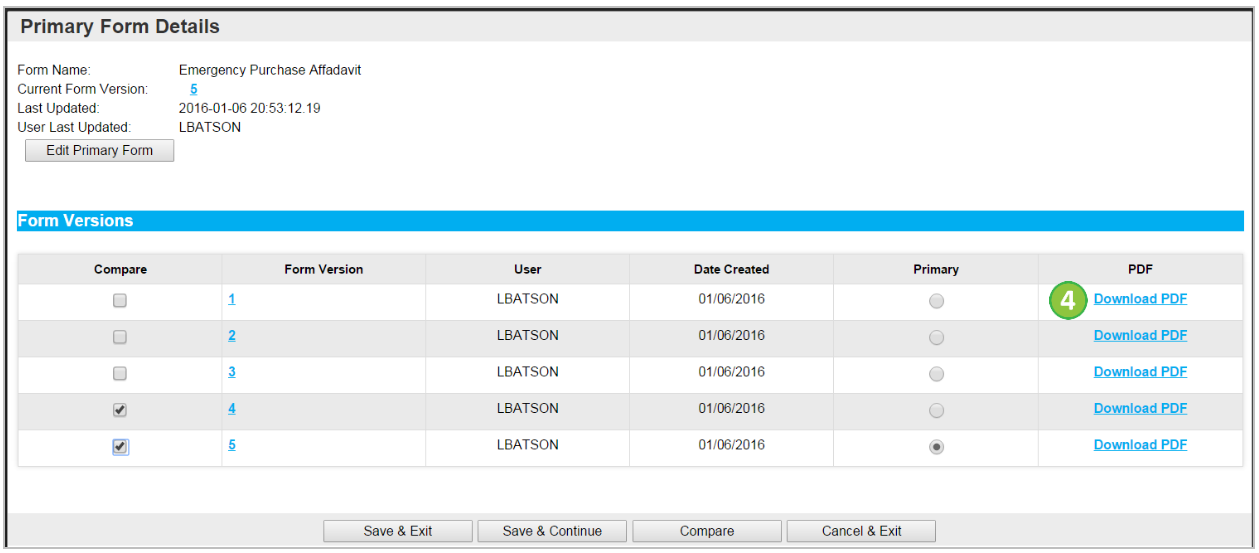
Compare and Review Forms

1. Select Compare on the forms to compare
2. Click **Compare**

3. Review the two forms for changes and click **Exit** when finished



4. To view form as PDF, click **Download PDF**



Form appears in PDF default viewer to save, print, etc.

Bid Attachments Field Descriptions

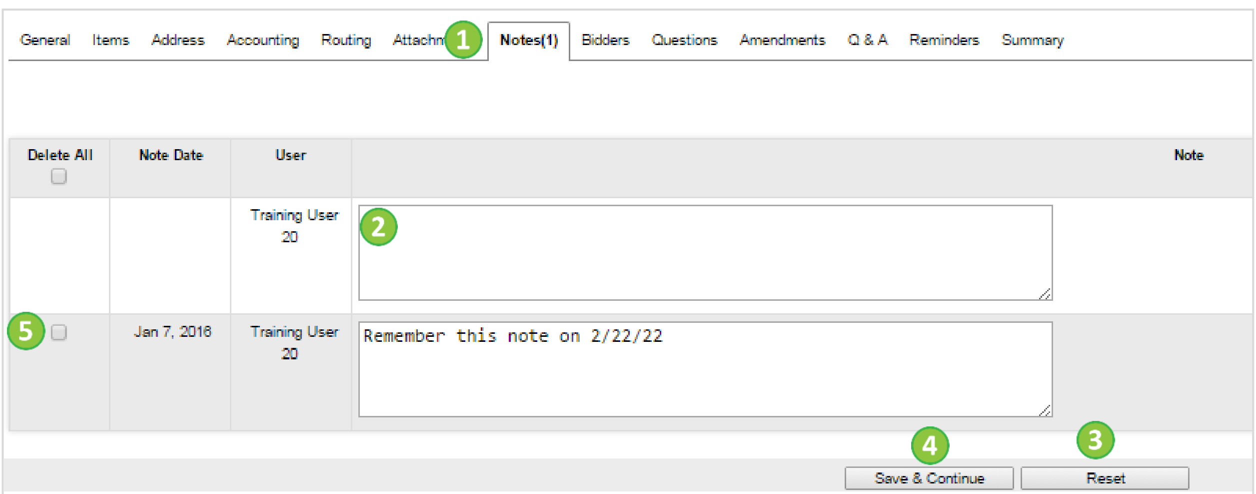
Field Name	Description
Agency (subtab)	Files or forms attached by the agency.
Vendor (subtab)	Files or forms attached by the vendor.
Name	Name of the attachment.
Description	Description of the attachment.
File Name	File Name
Uploaded Date:	A date range in which the attachment was created in the system.
Uploaded By	The user who created the attachment.
Location	The department for the attachment.
First Name	First name of the creator of the attachment.

Field Name	Description
Last Name	Last name of the creator of the attachment.
Form Title	The title or partial title of the form.
Form Description	Description given to form by creator or user who attached it. - Brand Name Justification - Emergency Extension Justification - Notice of Award - Change Order Justification
Show Vendor	Allows vendor to see attachment.
Attached Date	Date attachment was added to document.

Notes Tab

The **Notes** tab allows the user to add, edit and delete notes to provide additional information or special instructions for internal users. Only the user may edit their note. These notes are associated with all items on the Bid. To add notes to specific items, go to the Items tab and the Notes sub-tab. A note is similar to a post-it note as an internal communication.

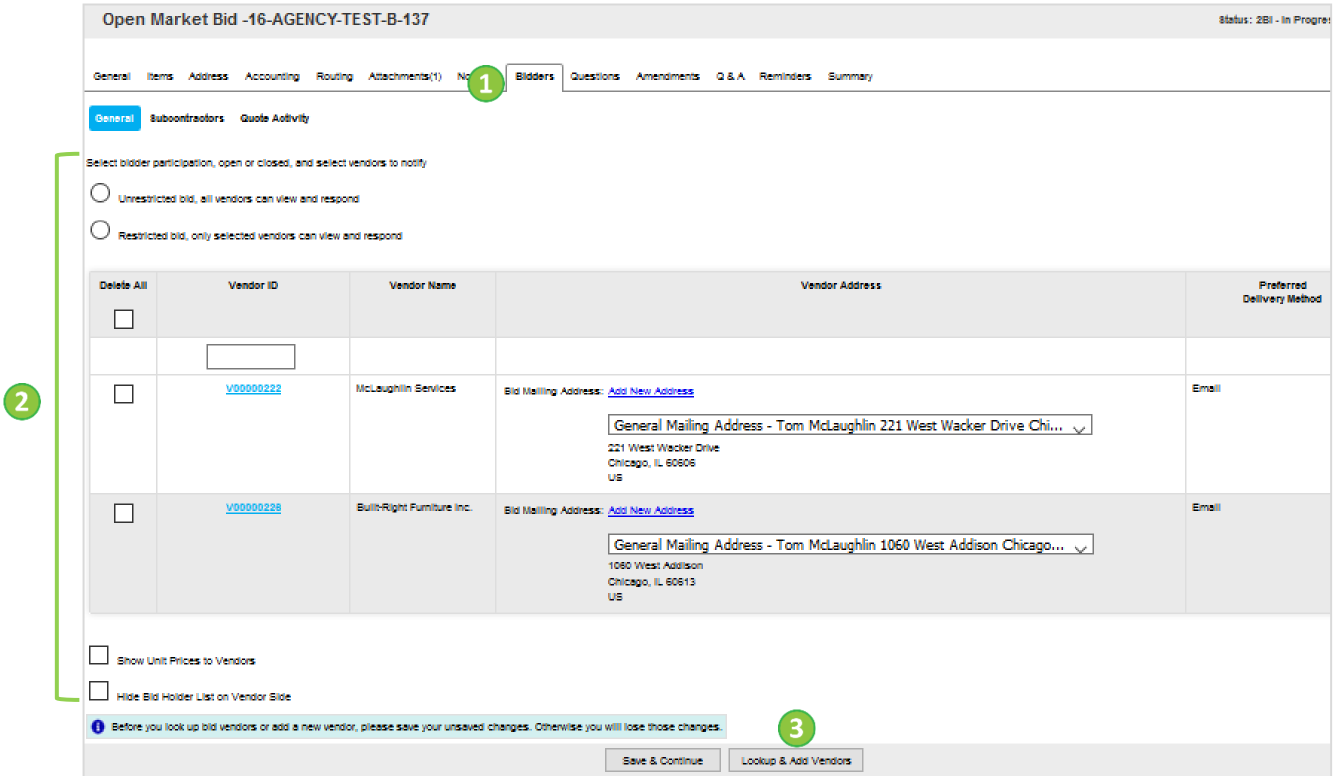
1. Select **Notes** tab
2. Enter note text
3. Click **Reset** to clear form before saving
4. Click **Save & Continue** to save notes
5. To delete a note, select **Delete** and **Save & Continue**



Bidders Tab

For an informal Bid, the BP user may see electronic Quotes submitted by vendor before the Bid Opening Date. After the Bid Opening Date, the notice is not visible online to the public.

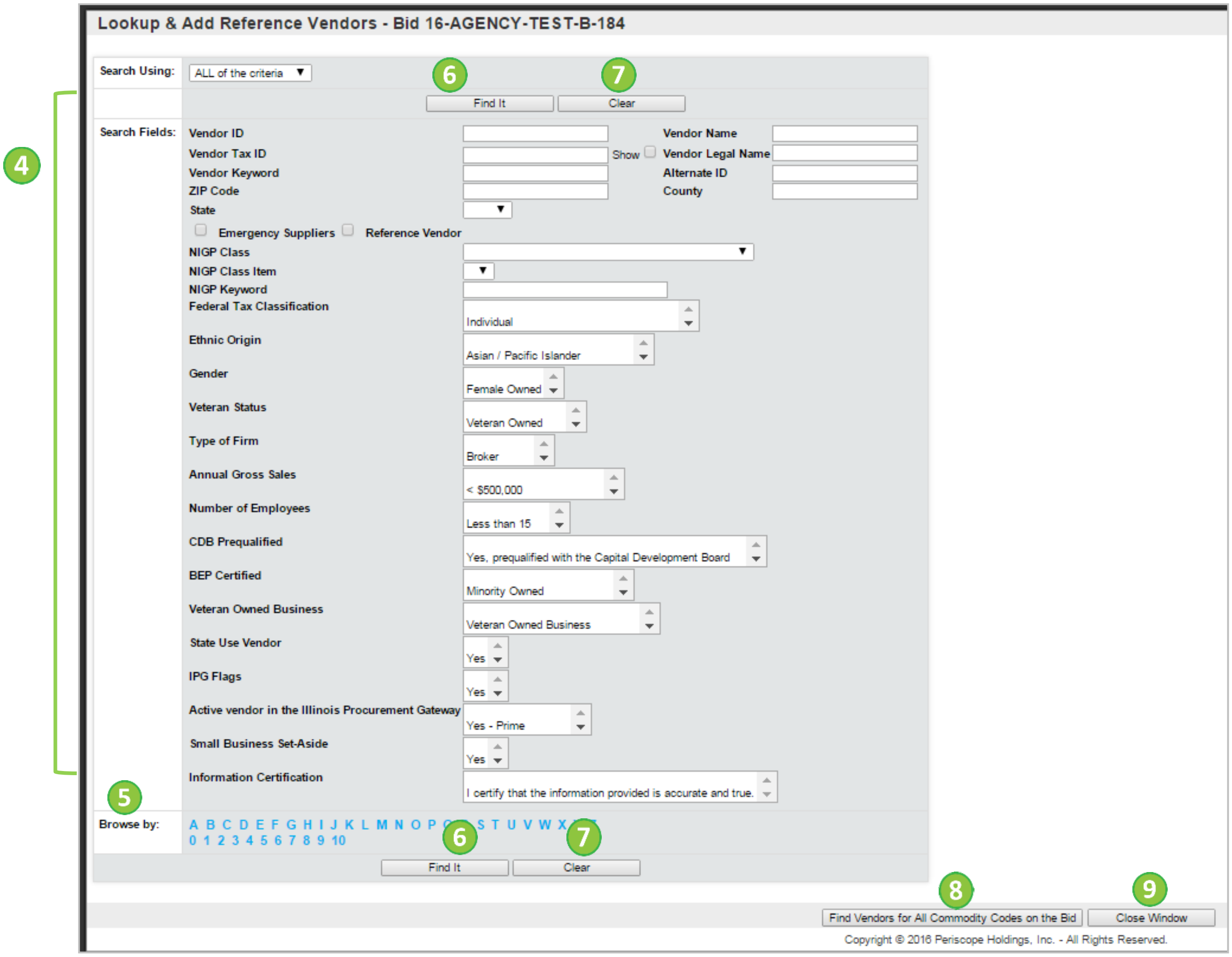
1. Select **Bidders tab**
2. Select **Bidder Participation** and **who to notify**



3. Click **Lookup & Add Vendors**

4. Enter **search criteria** for vendor, including NIGP codes listed on items tab under Additional NIGP codes
5. To browse use **Browse By** and click on letter or numeric entry
6. Click **Find It**
7. Click **Clear** to empty all data fields
8. Click **Find Vendor for All Commodity Code on the Bid**

9. Click **Close Window** to return to previous screen

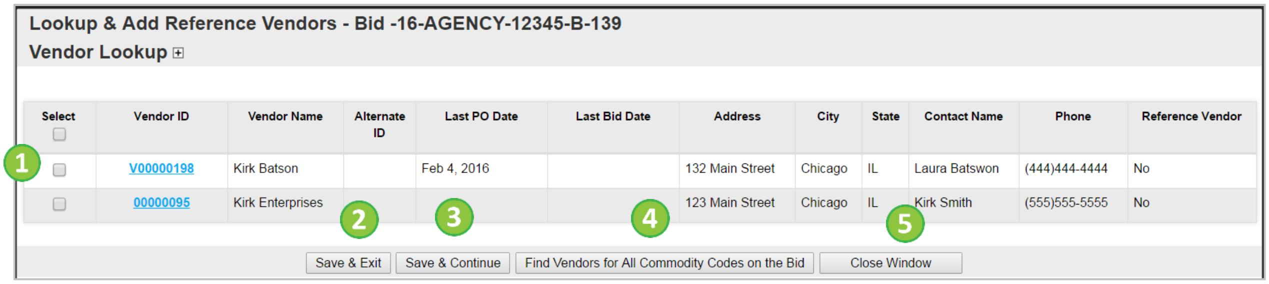


Bid Bidders Field Descriptions

Field Name	Description
Unrestricted Bid	When selected, all vendors can view the bid and respond. The general public can see the bid from the BidBuy login page Open Bid link from bid available and bid opening date.
Restricted Bid	When selected, only those vendors who were sent the bid can view and respond. This will not be public.
Vendor ID	If known, enter specific vendor ID
Show Unit Prices to Vendors	Show the item's unit price to the vendor.
Hide Bid Holder List on Vendor Side	All bidder names are not viewable to the vendors. The State will allows hide bid holder list. **This is mandatory to select.**
Add New Address	Add a new address for vendor Bid Mailing Address
Preferred Delivery Method	Communication method preferred chosen by vendor

Select Vendor(s) from the Search Results

1. Select radio button next to **Vendor ID**
2. Click **Save & Exit** to save vendor selection and return to **Bidders** tab
3. Click **Save & Continue** to save selection and continue to search for another vendor
4. Click **Find Vendors for All Commodity Codes on Bid** to find vendors registered to those commodity codes

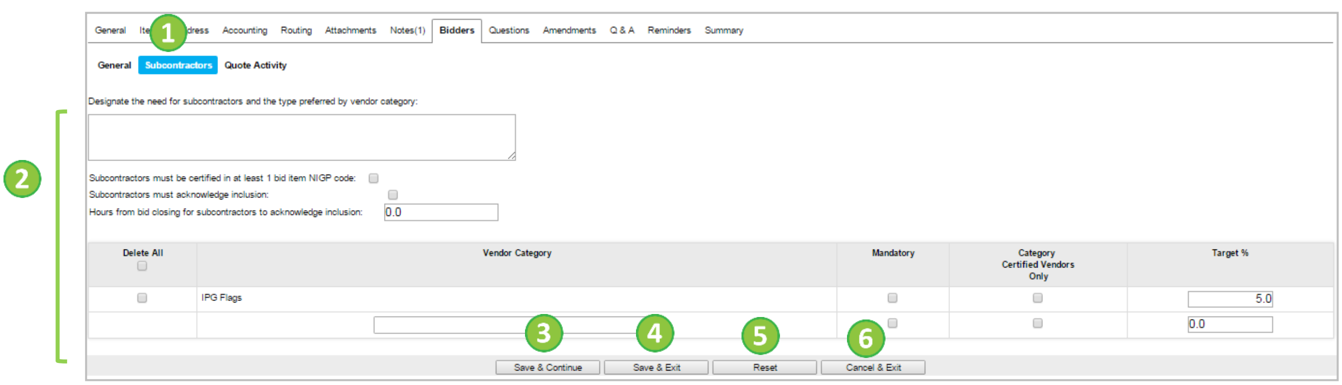


5. Click **Close Window** to exit without saving

Bidders Tab: Subcontractors

If the agency is required to include subcontractor goals on the bid, that can be enabled using the Subcontractors sub-tab. For example, if the agency is using BEP goals, the goal information is added on this subcontractor tab.

1. Select **Subcontractors** tab
2. Enter and select criteria for subcontractor, including the Target %
3. Click **Save & Continue** to continue adding criteria for subcontractors
4. Click **Save & Exit** to return to Bidders tab
5. Click **Reset** to clear changes before saving
6. Click **Cancel & Exit** to exit



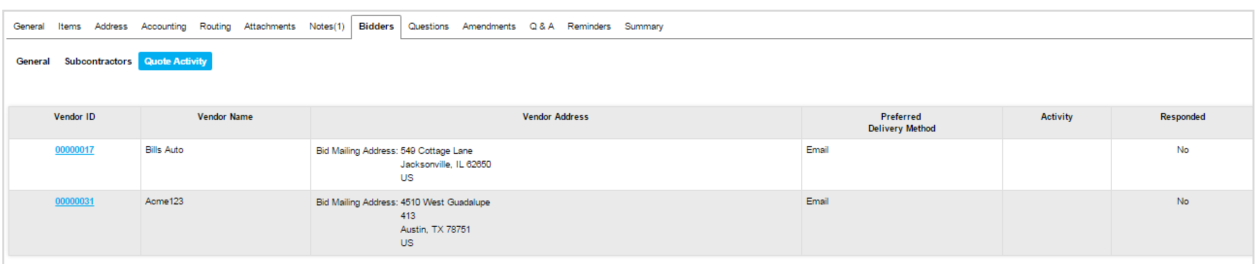
Bid Subcontractors Field Descriptions

Field Name	Description

Field Name	Description
Designate the need for subcontractors and the type preferred by vendor category.	Free form field to describe subcontractor requirements.
Subcontractors must be certified in at least 1 bid item NIGP code.	Check to require subcontractors to register with at least 1 NIGP code on one of the items on the bid. This does not apply to the additional NIGP codes listed at the bottom of each item.
Subcontractors must acknowledge inclusion.	Check to require subcontractors to acknowledge inclusion. Vendor(s) added on the quote as a subcontractor will be asked to login to BidBuy and acknowledge they were included on the prime's quote. If checked, vendors will not be disqualified if their subcontractors do not acknowledge inclusion, the Quote will display a warning notification.
Hours from bid closing for subcontractors to acknowledge inclusion.	Enter hours before bid opening date/time that subcontractors have to login to BidBuy and acknowledge inclusion.
Vendor Category	Add preferred categories for subcontractors.
Mandatory	Make categories mandatory for inclusion.
Category Certified Vendors Only	Make subcontractors certify they meet category requirements.
Target %	Enter target percent of subcontractor participation.

Bidders Tab: Quote Activity

Quote Activity provides the history of quotes submitted by vendor(s). Agency can view if the vendor submitted a quote but cannot see the details of that quote until the bid is opened. **This is not populated until after the bid is sent and vendor submits quotes on bid opening date.**



Bid Quote Activity Field Descriptions

Field Name	Description
Vendor ID	Vendor ID is the unique ID assigned to each vendor account. Note: Vendor ID is a hyperlink for display of Vendor Profile information in a popup window.
Vendor Name	The Name of the Vendor.
Vendor Address	The Address information of the Vendor associated with this Bid.
Preferred Delivery Method	The Preferred Delivery Method for documents sent to the Vendor.
Activity	Activity information for the Vendor, e.g., Quote number submitted and date and time information, or Quote number withdrawn and date and time information.
Responded	Responded status of the bidding Vendor, i.e., Yes/No.

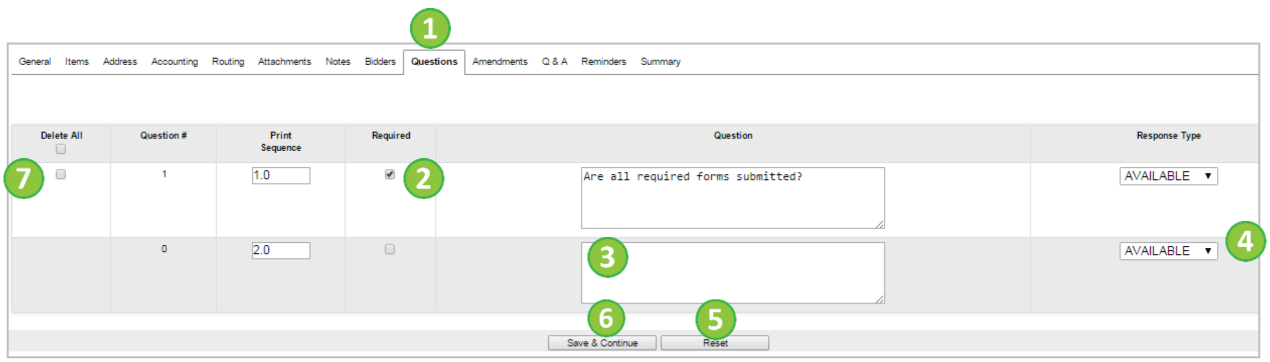
Questions Tab

The Questions tab allows the user to create specific questions for the vendor to answer with a supplied response type. The question section allows the user to add questions to all items. To add questions to individual items, go the Questions sub tab on the Items tab of the bid. Sample question types may be about specifications or delivery.

1. Select **Questions** tab
2. Select **Required** if this question is required for the vendor to respond
3. Enter the question information
4. Select **Response Type** from drop-down

> **See Bid Questions Field Descriptions Table. All fields with an Asterisk * are required.**

5. Click **Save & Continue** to continue adding questions
6. Click **Reset** to reset fields
7. To delete a question, select **Delete** and then, **Save & Continue**



Amendments Tab

Amendments can be created after the notice of bid is posted. They are used to amend the bid and publish the award date. The Amendment is for public posting during the review period between the notice of award and the execution of the contract.

Q&A Tab

The Q&A tab is a way for vendors and the agency to dialog within BidBuy regarding the bid. This feature is only usable before the bid opening, that restricts additional vendors to bid, however, the questions and answers remain viewable after the bid opening.

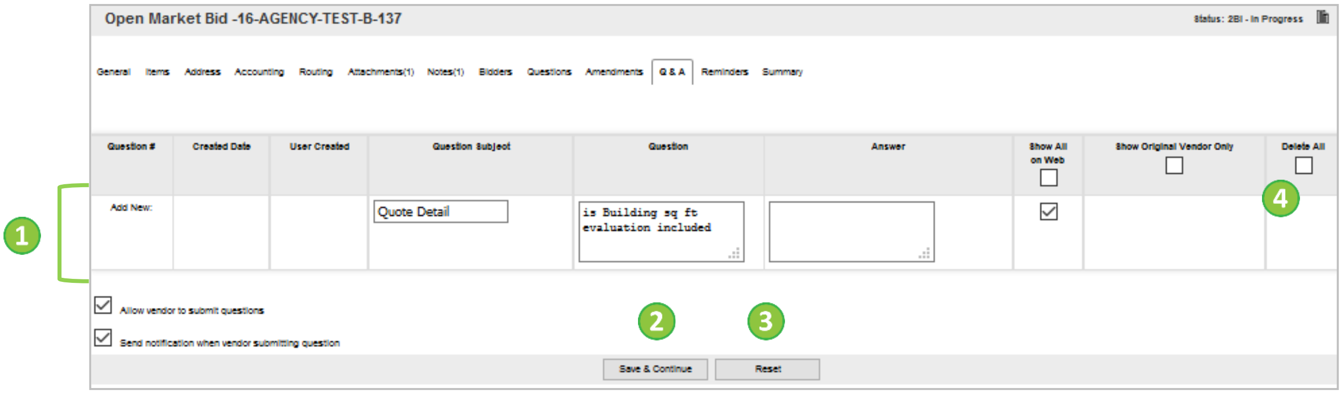
Q&A responses are added will be posted as a Bid Amendment, then the public can see Q&A.

1. Enter **Q&A** information

> **See Bid Q&A Field Descriptions for Q&A tab field descriptions**

2. Click **Save & Continue** to save
3. Click **Reset** to clear fields before saving

4. Select **Delete**, then **Save & Continue** to delete item



Bid Q&A Field Descriptions

Field Name	Description
Question #	Automatically generated by BidBuy.
Created Date	Automatically generated by BidBuy.
User Created	Automatically generated by BidBuy, based on login.
Question Subject	User (either vendor or agency) supplied.
Question	User (either vendor or agency) supplied.
Answer	User (either vendor or agency) supplied.
Show on Web	Check to make viewable to all vendors registered in BidBuy
Show Original Vendor Only	Check to only make the question and answer viewable to the individual vendor.
Delete	Check to delete, delete will occur after Save & Continue is clicked.
Allow vendor to submit questions	Gives permission to vendor to submit questions. Q&A will be used to allow vendors to submit questions. The Ad Hoc tool will be used to route the Questions for answer and approval. Use Reminders to turn off Bid Q&A
Send notification when vendor submitting question	Sends email to agency user when vendors submit questions.

Reminders Tab

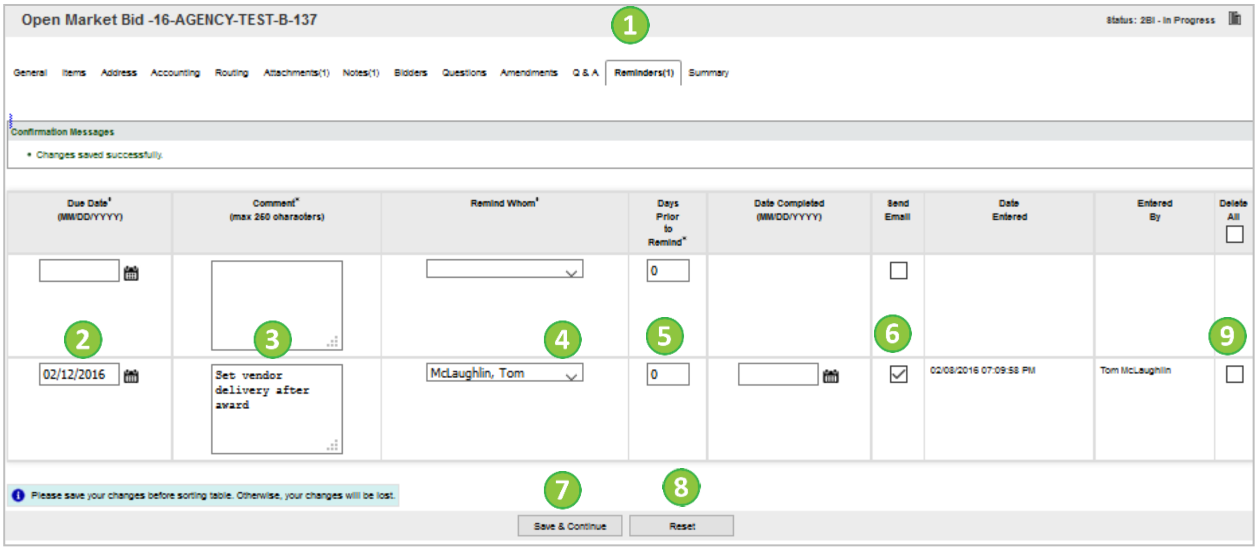
Reminders are a useful function of the application to send to a specific State user of BidBuy on a specific date. Use a Reminder to alert the BP user to turn off Bid Q&A.

1. Select **Reminders** tab

See Bid Reminders Field Descriptions for Reminder tab field descriptions

2. Select **Due Date**
3. Enter **Comments**
4. Select **Remind Whom** from drop-down list
5. Enter **Days Prior to Remind**
6. Select **Send Email** if desired
7. Click **Save & Continue** to save reminder

8. Click **Reset** to empty all fields not yet saved



9. To delete a reminder, select the **Delete** and click **Save & Continue**

Bid Reminder Field Descriptions

Field Name	Description
Due Date	Date given to reminder to be completed by
Comment	Examples: - Prep for Vendor Pre-Bid - Prep for Vendor Opening - Notify the evaluators - BEP approvers to review Utilization Plans on each response Reminders can still be added after the Bid opens.
Remind Whom	Identifying the user who is to review the reminder
Days Prior to Remind	The number of days prior to the Due Date the reminder is given. "0" will post the reminder on the due date.
Date Completed	The Date that the receiver of the reminder marks as having accomplished the task.
Send Email	Option to send email on the Days Prior to Remind
Date Entered	Date the reminder was created
Entered By	The user who created the reminder

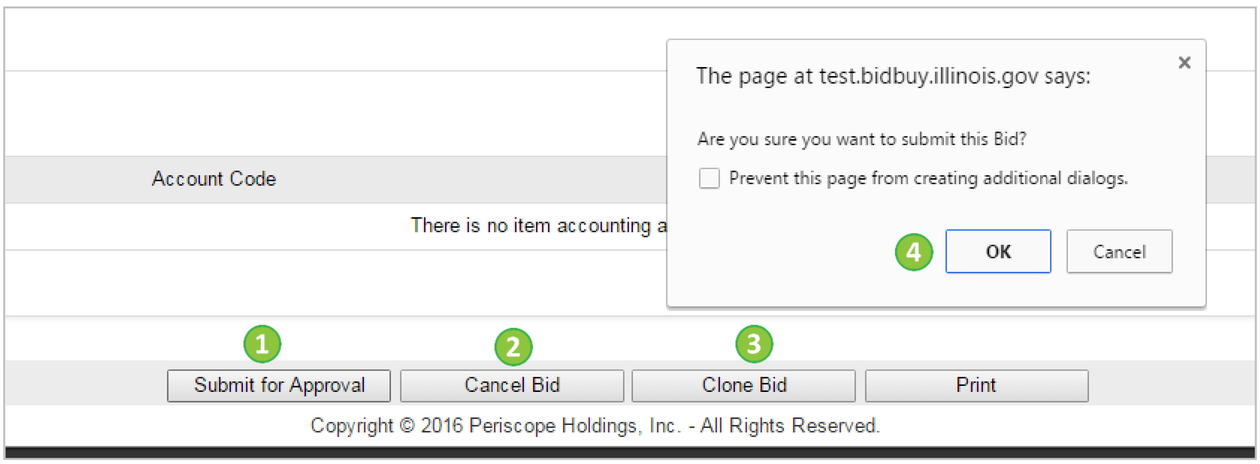
Submit Bid for Approval

Summary Tab

The Summary Tab will feature all the data entered and selection choices by the user in the previous tabs. This gives the user an opportunity to review all applicable information and return to any given tab to edit errors or update with new information. Red validation errors do not allow you to process the Requisition until reconciliation. Yellow Errors are warnings, but allow you to process the Bid.

Upon completion of creating a bid the user will have the option on the next step with the status of it by scrolling down to the bottom of the **Summary** tab.

1. At the bottom of Summary tab, click **Submit for Approval**
2. Click **Cancel Bid** to delete Bid
3. Click **Clone Bid** to start another Bid with all the settings of the current one
4. After you click **Submit for Approval**, Click **OK**

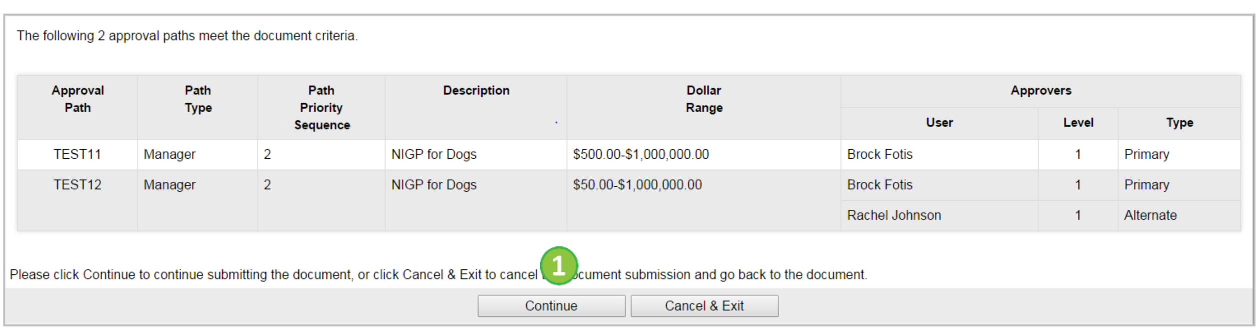


Submit for Approval

Once the tabs are completed, including all required fields, the user may submit the complete document for approval. When an approval path is configured for the requisition, the approvers will attach to the bid and it will move to Ready for Approval status.

If there is an approval path associated with this document, the user will see the approvers and the status on the summary page.

1. Click **Continue** to send approver email to approve



The following 2 approval paths meet the document criteria.

Approval Path	Path Type	Path Priority Sequence	Description	Dollar Range	Approvers: User	Approvers: Level	Approvers: Type
TEST11	Manager	2	NIGP for Dogs	$500.00-$1,000,000.00	Brock Fotis	1	Primary
TEST12	Manager	2	NIGP for Dogs	$50.00-$1,000,000.00	Brock Fotis	1	Primary
					Rachel Johnson	1	Alternate

Please click Continue to continue submitting the document, or click Cancel & Exit to cancel [1] ocument submission and go back to the document.

Continue Cancel & Exit

When there is no approval path assigned, the user is prompted to select:

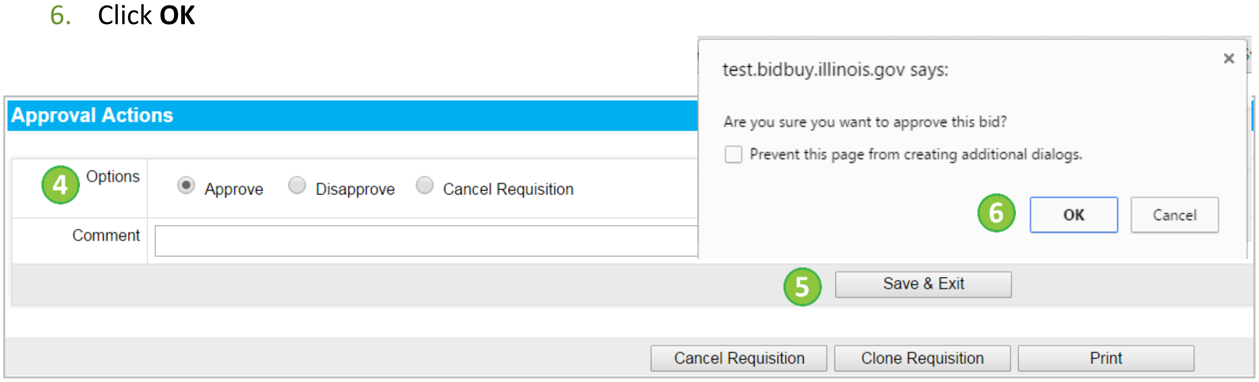
- **Automatic Approval** – Selecting this will move a document to Ready to Send status. This option is visible when there are no configured approval paths on the document.
- **Manually Add Approvers** – Requires the user to choose from a drop down list with individuals designated as approvers. The user selects an individual, clicks add approver and then saves the approval (see example below).

The sequence number is the order in which the approver can approve the document.

1. Select **Manually add Approvers** to add additional approvers
2. Select **Approvers** from drop-down list and click **Add Approver**
3. Click **Save & Continue** to continue
4. Click **Cancel & Exit** to exit

Approve Bid at Home Page

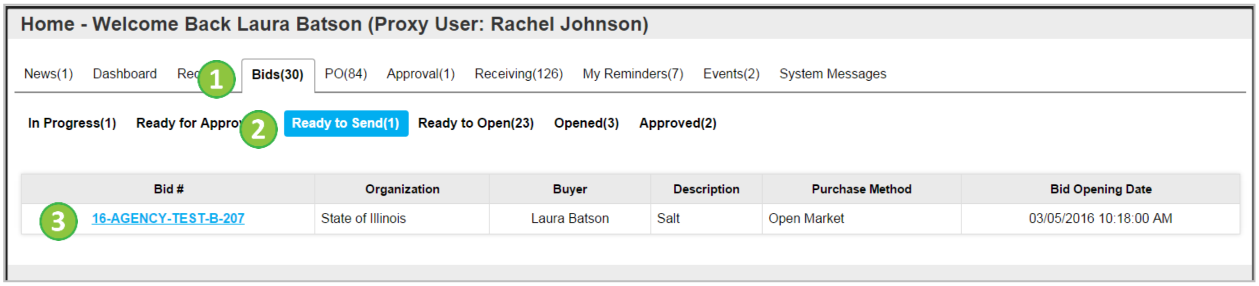
1. From the Home page, select **Bid** tab
2. Click **Ready for Approval**
3. Select **Bid #**
4. Scroll to the bottom of the **Summary** tab and select **Approve**
5. Click **Save & Exit**
6. Click **OK**



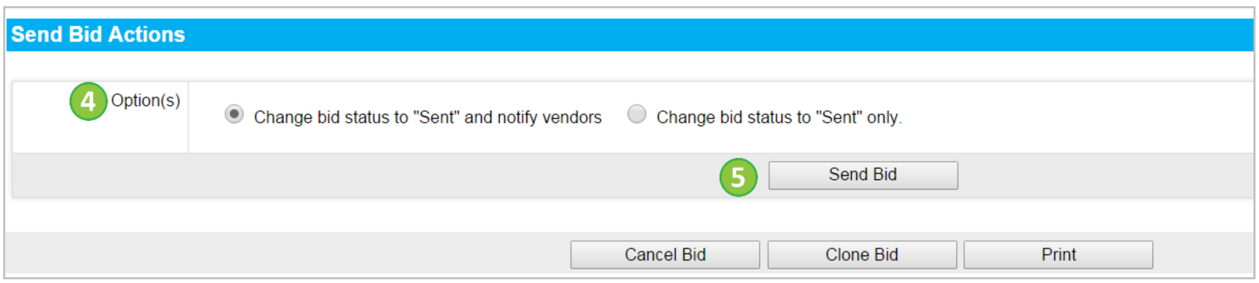
Send Bid to Publish

Once the Bid is approved, the user will send the Bid to publish it online at the date and time of the Available date.

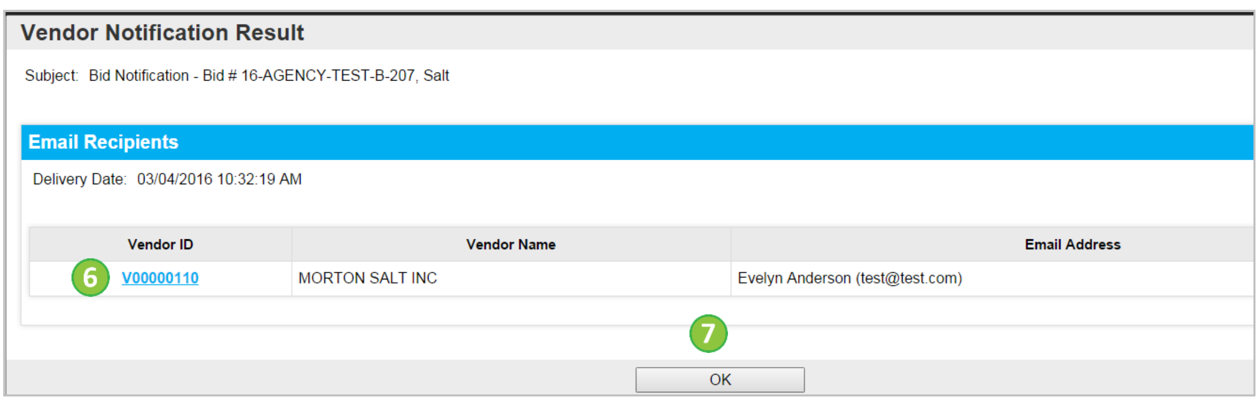
1. From the **Home** page, select **Bid** tab
2. Click **Ready to Send** to post to vendors
3. Click **Bid #**



4. Scroll to the bottom of the **Summary** tab and select one of the options
5. Click **Send Bid**



6. If you select **Change bid status to "Sent" and notify vendors**, **Vendor Notification Result** displays
7. Click **OK**



Vendors are notified of Bid and able to create a bid

Amend Bid

Once the Bid document is sent or posted online, the vendors can view the bid and respond. During this time, if there are any changes to the bid, a Bid Amendment is completed. Within the Bid document, the user can create a bid amendment using an amendment feature to publically announce any changes to the bid for as long as the bid remains open.   Multiple amendments can be created and published by BP users.

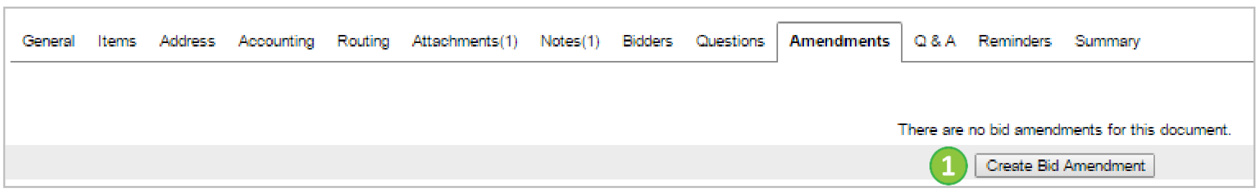
Once the bid is sent to vendors or posted online, the following changes can be made (see functionality in creating a bid):

- General Information
- Adding Vendors
- Q & A
- Reminders

Publishing new information to the bid after it is sent is accomplished using an Amendment.

Amendments Tab

Changes to a bid can be completed by an amendment only after the bid has reached "Sent" status. They are listed in order by date with all information about the amendment. Amendments do not have approval paths.



1. Click **Create Bid Amendment**

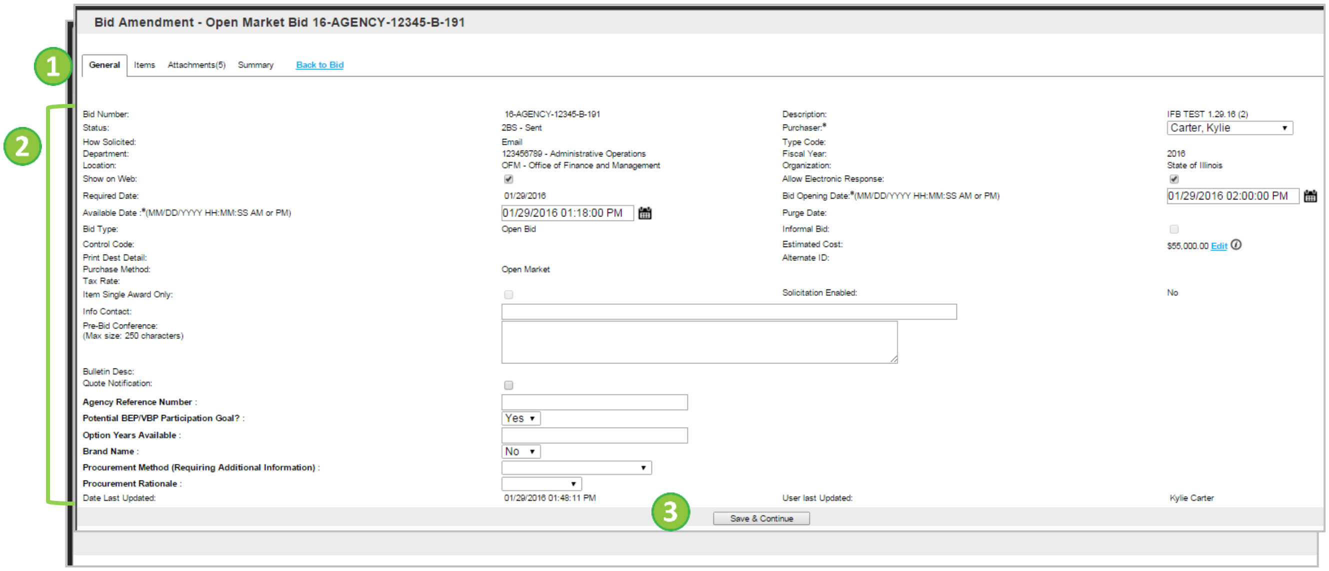
Amendment Tab: General

1. Select **General** tab

See Bid General Field Descriptions for General tab field descriptions

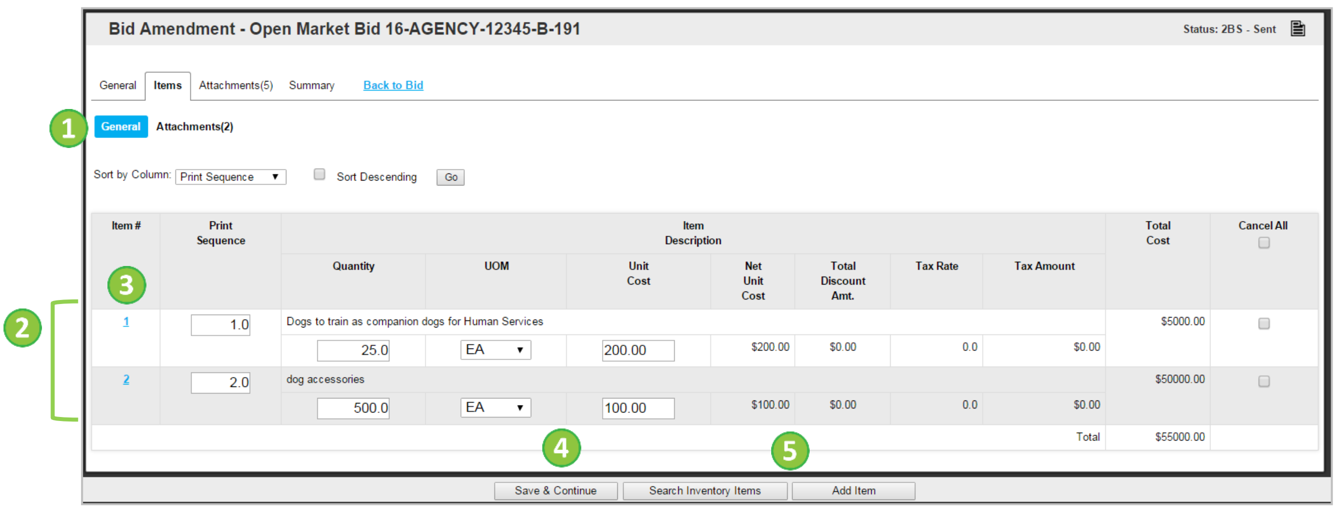
2. Update information

3. Click **Save & Continue**



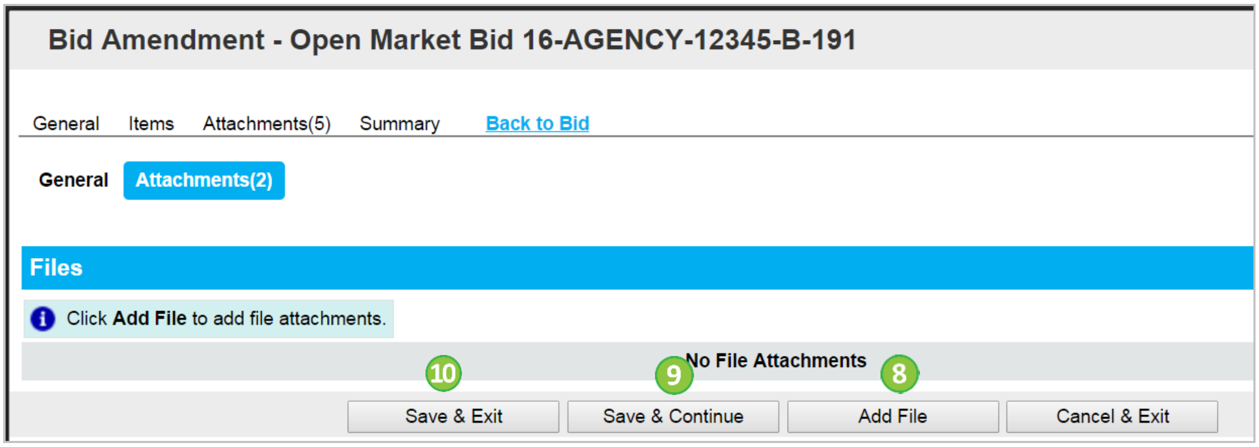
Amendment Tab: Items

1. Under **Items** tab, select **General** sub-tab
2. Update information
3. Click **Item #** to update more fields
4. Click **Save & Continue**
5. To add items, click **Add Item** (see functionality under **Items Tab** under the **Complete Bid Section on page 39)**



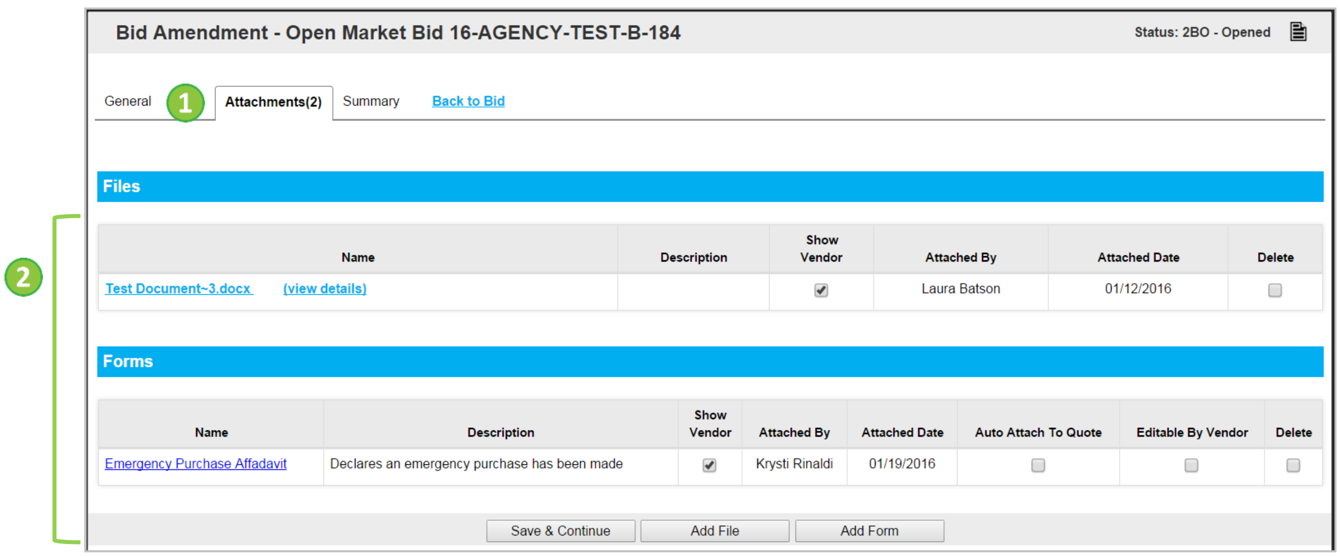
6. Select **Attachments** tab
7. Select **Item #** to add attachment to a specific item
8. Click **Add File** and add attachments (see **Attachment** tab for functionality in **Complete Bid Section**, page 50)
9. Click **Save & Continue** to add additional files

10. Click **Save & Exit** to save new changes



Amendment Tab: Attachment(s)

1. Select **Attachments** tab
2. Update attachments and forms (see **Attachment** tab for functionality in **Complete Bid Section**, page 50)



Apply Amendment

An amendment does not have an approval path, so the State mandates that a reminder is sent to the required approvers, such as the APO, SPO, etc. The State Purchasing Officer will apply the amendment and will be notified via Reminder.

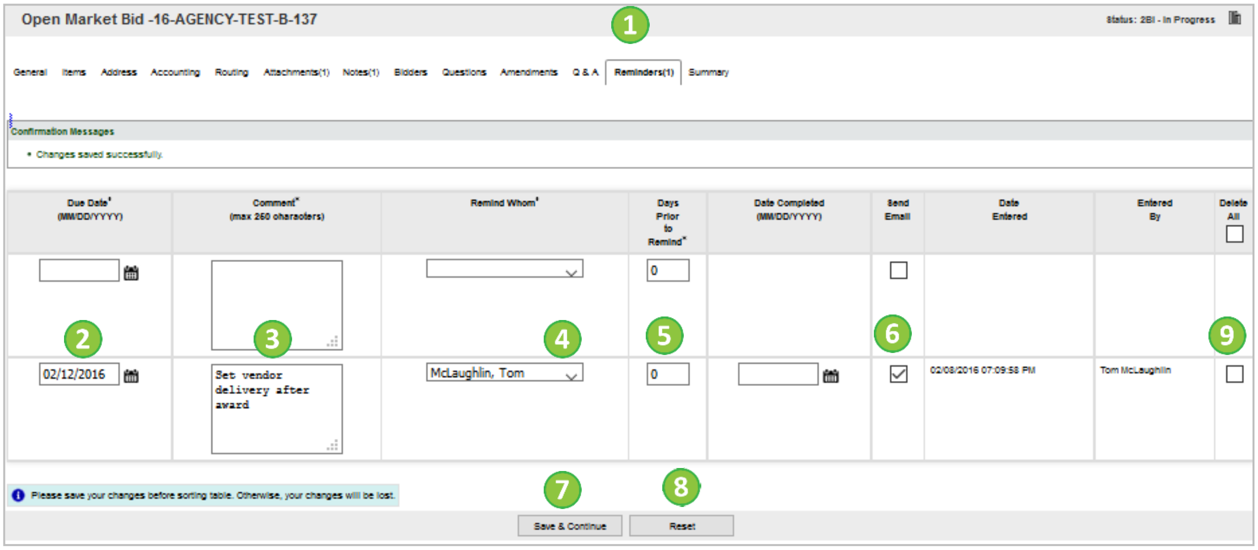
Reminders Tab

Reminders are a useful function of the application; they can be sent to a specific State user of BidBuy on a specific date.

1. Select **Reminders** tab

See Bid Reminders Field Descriptions for Reminder tab field descriptions

2. Select **Due Date**
3. Enter **Comments**
4. Select **Remind Whom** from drop-down list
5. Enter **Days Prior to Remind**
6. Select **Send Email** if desired
7. Click **Save & Continue** to save reminder
8. Click **Reset** to empty all fields not yet saved



9. To delete a reminder, select the **Delete** and click **Save & Continue**

Bid Reminder Field Descriptions

Field Name	Description
Due Date	Date given to reminder to be completed by
Comment	Examples: - Prep for Vendor Pre-Bid - Prep for Vendor Opening - Notify the evaluators - BEP approvers to review Utilization Plans on each response Reminders can still be added after the Bid opens.
Remind Whom	Identifying the user who is to review the reminder
Days Prior to Remind	The number of days prior to the Due Date the reminder is given. "0" will post the reminder on the due date.
Date Completed	The Date that the receiver of the reminder marks as having accomplished the task.
Send Email	Option to send email on the Days Prior to Remind
Date Entered	Date the reminder was created
Entered By	The user who created the reminder

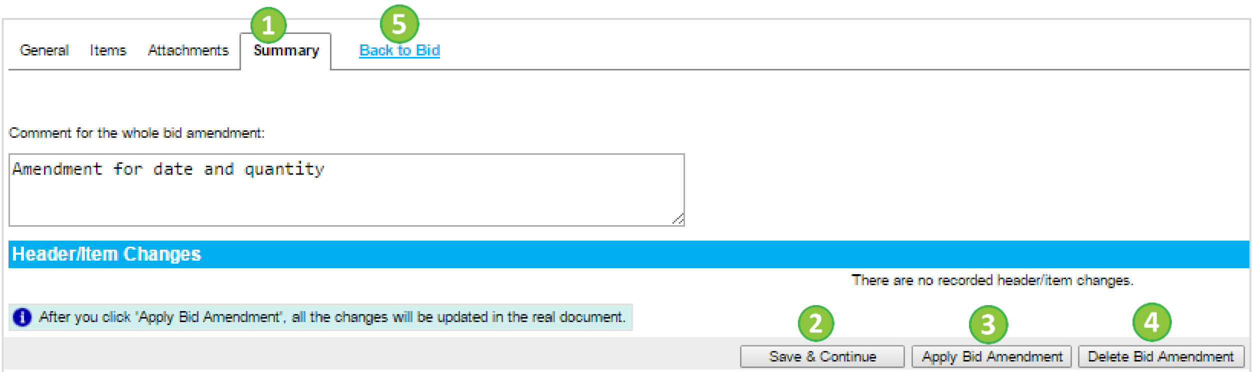
Summary Tab

1. Under **Summary** tab, enter amendment comments

2. Click **Save & Continue** to save new changes
3. Click **Apply Bid Amendment** to apply changes to bid

If Apply Bid Amendment is not selected, the changes will not impact the Bid.

4. Click **Delete Bid Amendment** to delete the amendment
5. Click **Back to Bid** to return to main bid screen



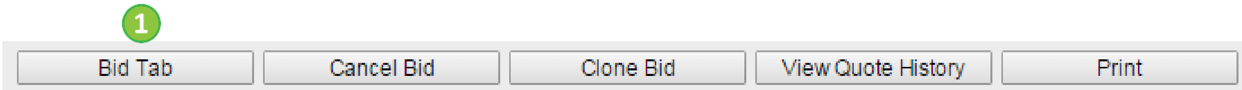
Open Bid

- *Bid Tabulation:* When the pre-determined bid opening date and time is reached, the bid is closed to the public and vendor community. BidBuy automatically tabulates the responses by price and presents the lowest price for consideration as the award.
- *Bid Summary and Award:* When responses have been tabulated, a recommendation for award can be made. The user may view all responding Vendor pricing and select the lowest responsive and responsible Vendor. Items can be awarded per Vendor or per Item Number dependent upon the availability to do so in the solicitation.

The Bid tabulation process is a feature of BidBuy that assists with determining who should be awarded the bid. Within the process, the user will also find the Scorecard feature. Scorecard can be accessed only after the bid has been sent and it is past Open Bid Date, or in Ready to Open status.

1. To begin the process, from the bid's summary page, scroll to the bottom and click **Bid Tab**

This link is not available until after the Bid Opening Date



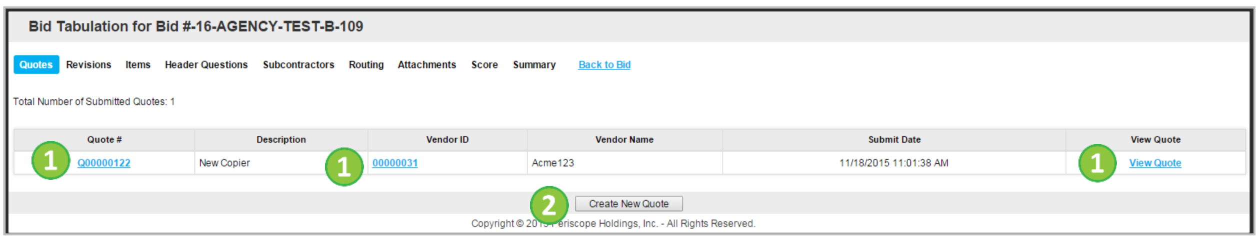
Bid Tab: Quote Tab

From the Quotes tab, the user can view quotes that have been received, electronically. Additionally, the user can create a new quote for quotes that come in via paper copy.

NOTE: The vendor must be registered in BidBuy prior to entering the quote

Create Manual Quote

1. To view quote information, click Quote #, Vendor ID and/or View Quote to display that information in a popup window
2. To add a new vendor quote, click **Create New Quote**



Negotiated Quotes

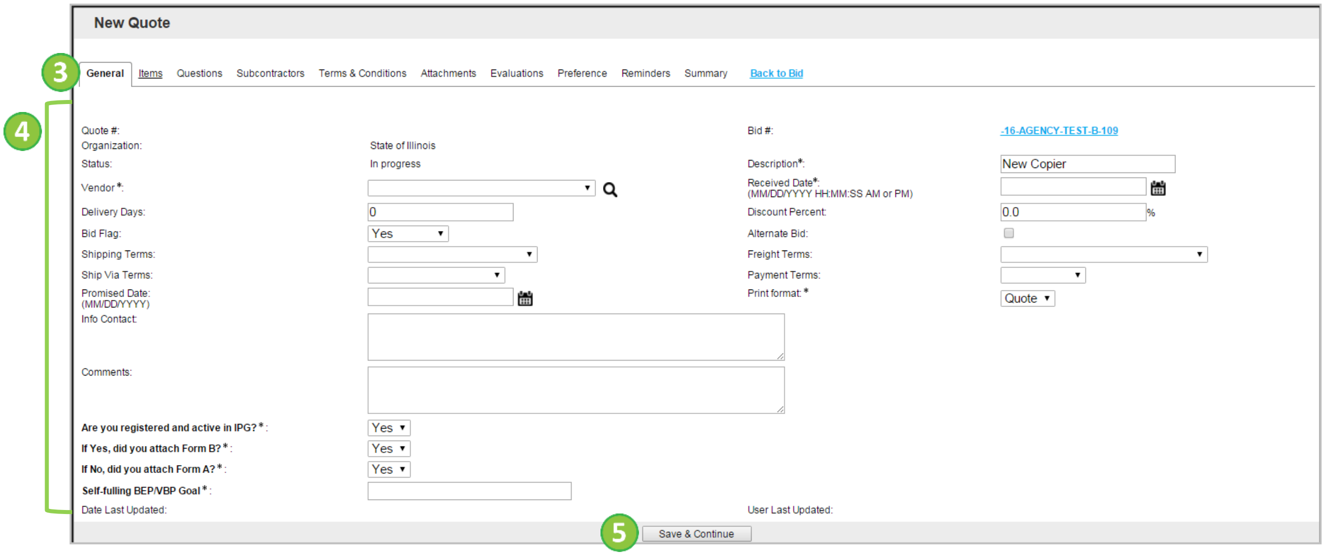
When a quote is entered for a negotiation, the BP user will enter a new quote for that vendor and make note that it was entered as part of the negotiation process/manually entered. Description should state default info, but add "NEG0TIATED" so users can easily identify the negotiated quote.

- ✓ Attach the submitted negotiated documents to the Quote
- ✓ Enter the date the negotiation was received on the General tab of the Quote. An error message will appear stating the Bid will be marked as late, click OK.
- ✓ Enter other information as needed, such as Terms and Conditions
- ✓ Submit the Quote
- ✓ Once submitted, deselect the vendor's prior submitted Quotes from consideration.
- ✓ Award process to follow as normal.

Quote: General Tab

3. Select **General tab**
4. **Enter General Information**

5. Click **Save & Continue**



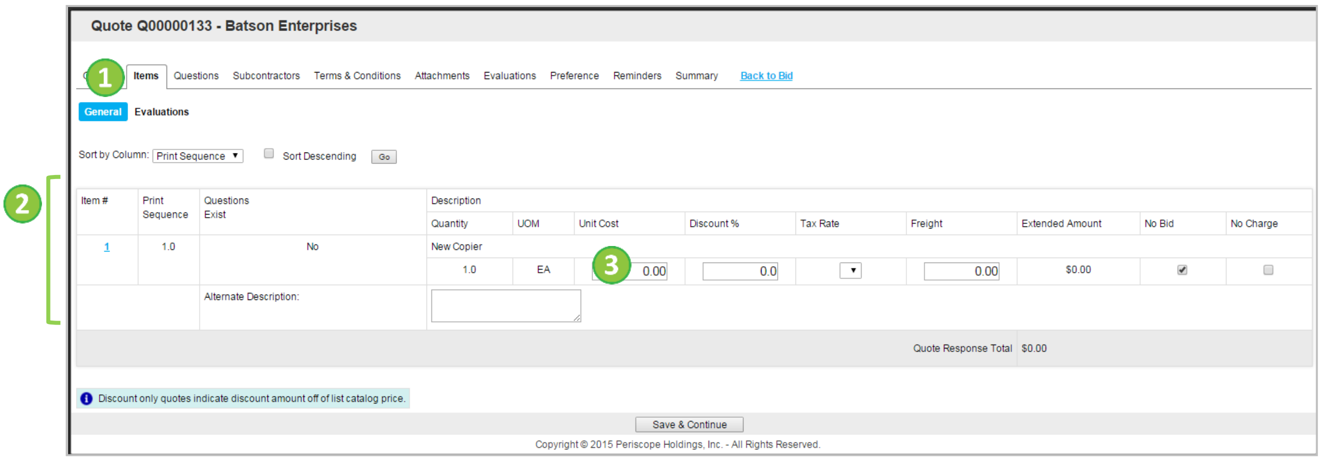
Quote Field Descriptions

Field Name	Description
Quote Number	This number is automatically generated when the user selects Save & Continue.
Bid Number	This number was automatically generated when the user selects created the Bid. This Quote is linked to the Bid Number.
Description*	Enter a short description to help identify the bid. Use Complete words, not abbreviations. Start with alpha agency identifier, and then describe the item to be procured. Use noun, adjectives
Status	The current status of the bid.
Vendor*	Using the dropdown menu, if available, select a vendor for this quote. The default of the vendor is determined by the configuration of the system. Note: the vendors only show up if they have been added previously.
Received Date*	The date the bid was receive by the State. Enter the date and time (MM/DD/CCYY HH:MM:SS AM or PM) or use the calendar lookup icon to select the date and time of the receiving date or use the calendar lookup icon to select the date and time.
Delivery Days	Number of days for delivery
Discount %	Any discount the vendor is providing
Bid Flag	Yes or No
Shipping and Payment Terms	Determined in the Purchase Order. Not used here by the State.
Promised Date	Enter the date (mm/dd/yyyy) the commodity or service is/was promised for delivery.
Print Format*	Use default Bid Print New = Using the dropdown menu, select an Agency defined print format for this bid.
Info Contact	Enter the contact information of the individual who can be contacted for bid information.
Comments	Adds additional text. Free form field up to 500 characters including spaces.
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the

Field Name	Description
	online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

Quote: Items Tab

1. Select **Items** tab, then **General** tab
2. Update fields
3. Click **Save & Continue**

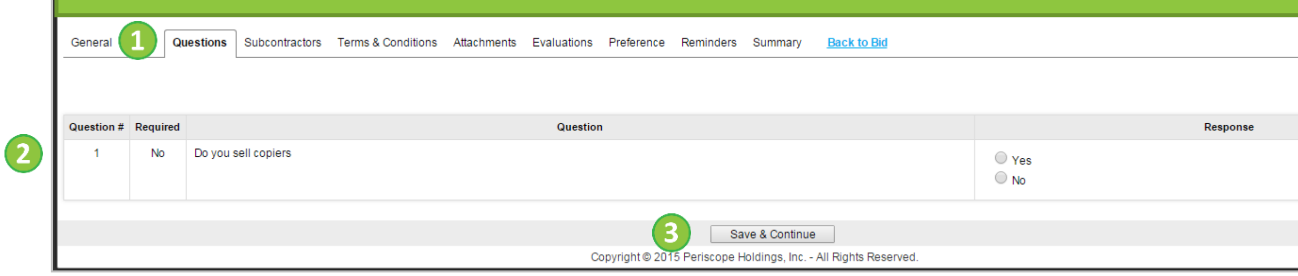


State does not use Evaluation Sub-Tab for Items.

Quote: Questions

1. Click **Questions** tab
2. Respond to the question(s)

The subcontractors must be registered in BidBuy before entering them into the system.

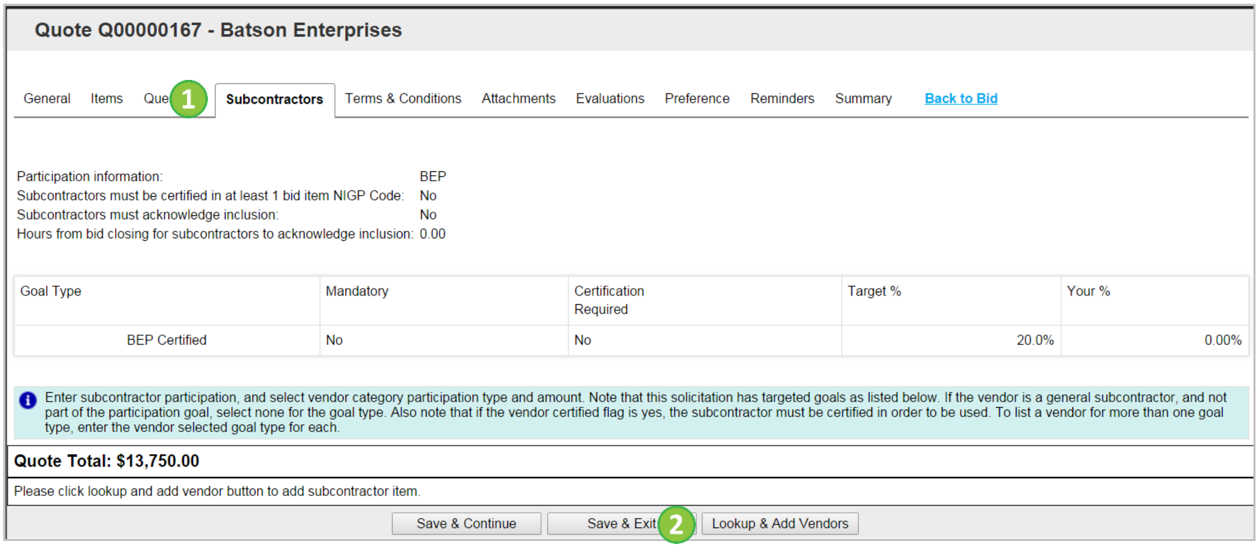


3. Click **Save & Continue**

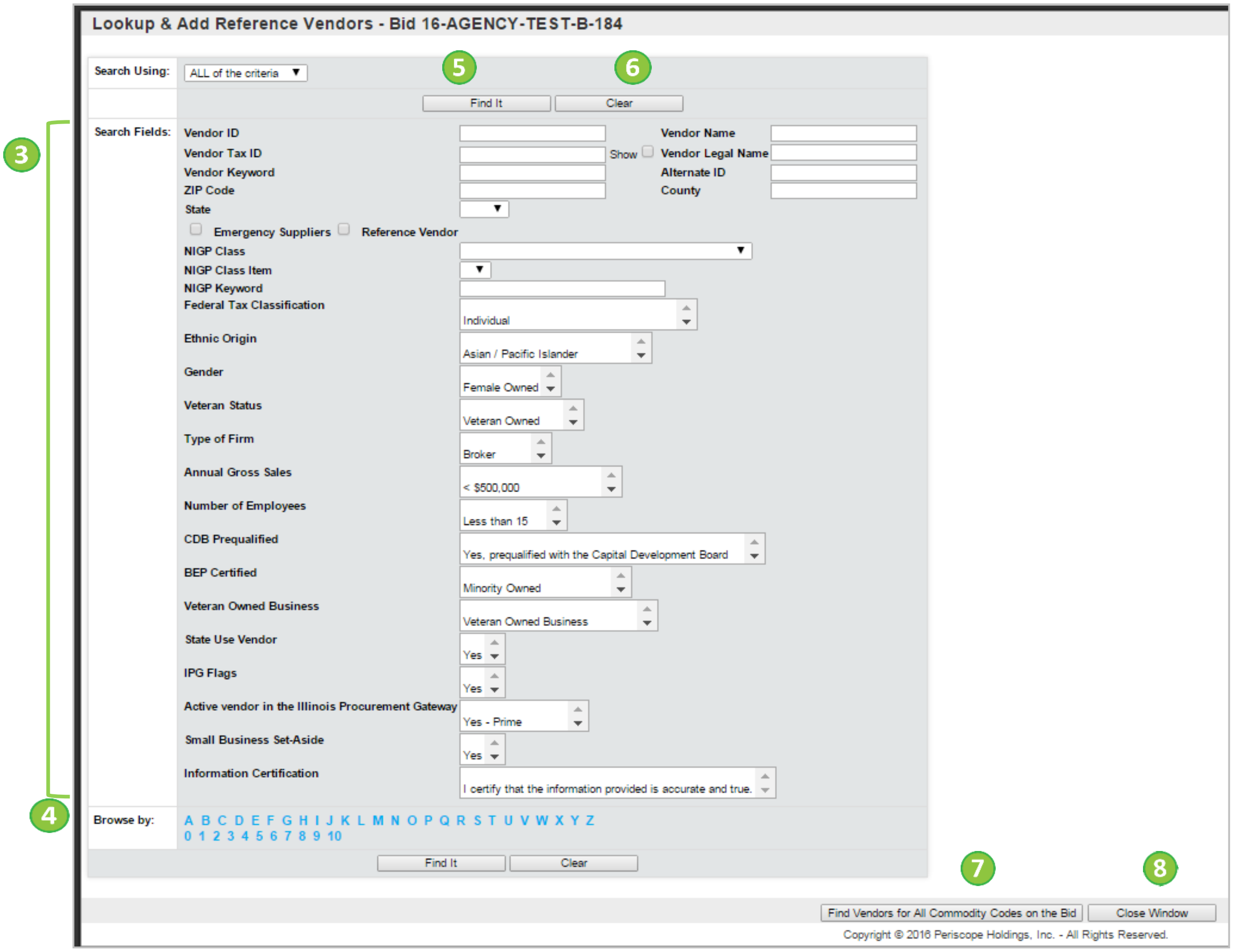
Quote: Subcontractors

1. Select Subcontractors tab

2. Click **Lookup & Add Vendors**

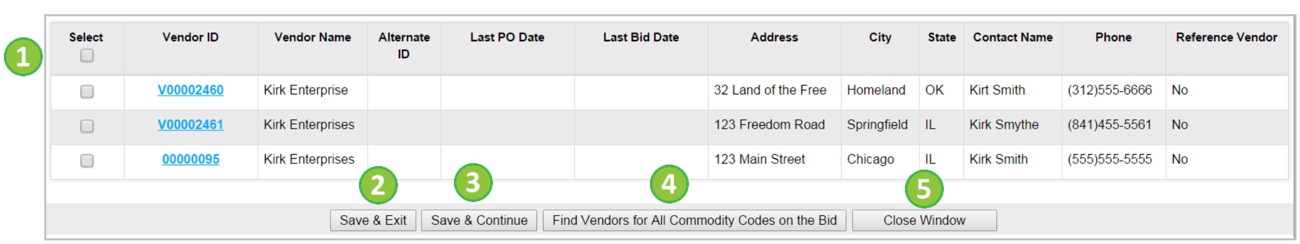


3. Enter search criteria for vendor
4. To browse use **Browse By** and click on letter or numeric entry
5. Click **Find It**
6. Click **Clear** to empty all data fields
7. Click **Find Vendors for All Commodity Codes on the Bid**
8. Click **Close Window** to return to previous screen



Select Vendor(s) as Sub-Contractor(s)

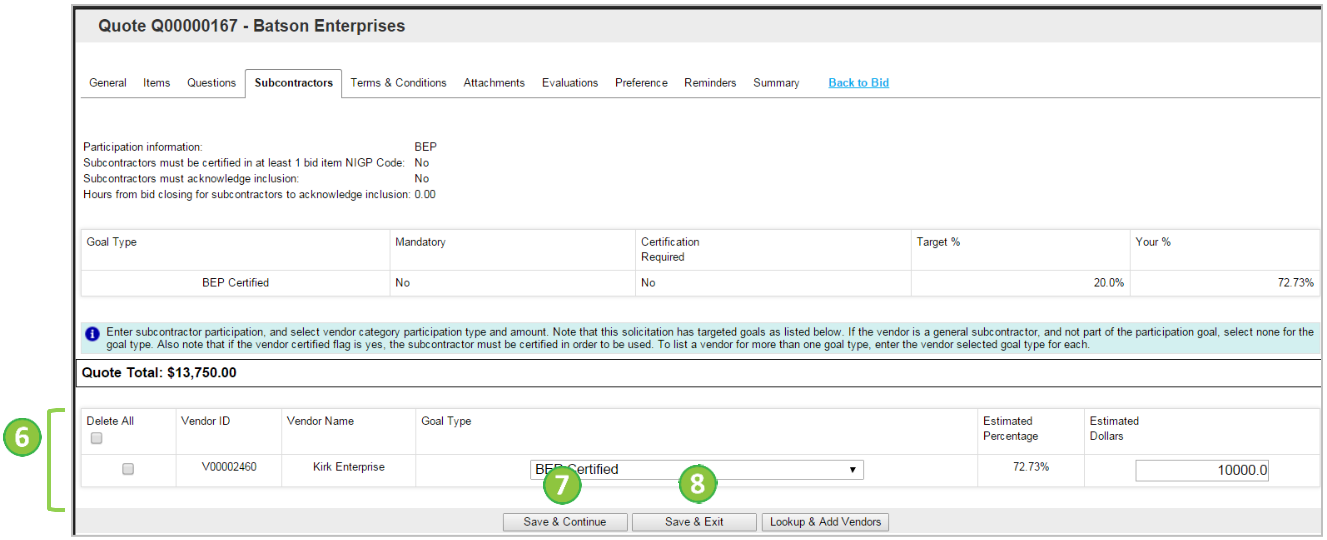
1. Select radio button next to **Vendor ID**
2. Click **Save & Exit** to save vendor selection and return to **Bidders** tab
3. Click **Save & Continue** to save selection and continue to search for another vendor
4. Click **Find Vendors for All Commodity Codes on Bid** to find vendors registered to those commodity codes
5. Click **Close Window** exit without saving



Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone	Reference Vendor
	V00002460	Kirk Enterprise				32 Land of the Free	Homeland	OK	Kirt Smith	(312)555-6666	No
	V00002461	Kirk Enterprises				123 Freedom Road	Springfield	IL	Kirk Smythe	(841)455-5561	No
	00000095	Kirk Enterprises				123 Main Street	Chicago	IL	Kirk Smith	(555)555-5555	No

6. Select **Goal Type** and enter **Estimated Dollars**
7. Click **Save & Continue** to continue with updates

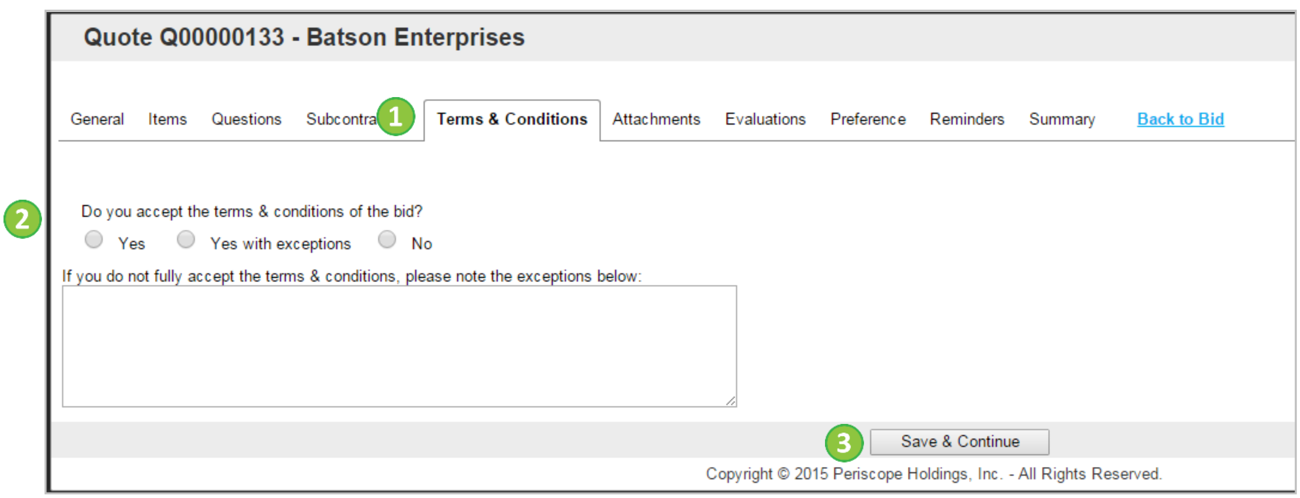
8. Click **Save & Exit** to save changes and exit



Quote: Terms & Conditions

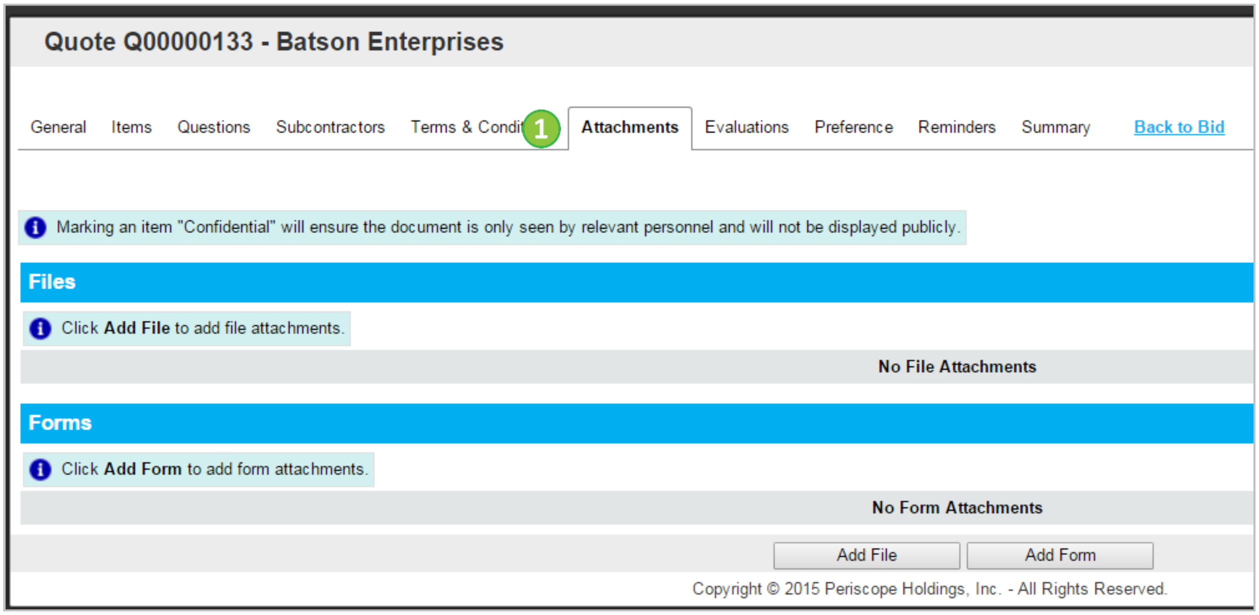
The attachments that the Basic Purchasing user added when creating a bid are listed on the Terms & Conditions tab.

1. Select **Terms & Conditions** tab
2. Respond to question
3. Click **Save & Continue**



Quote: Attachments

1. Select **Attachments** tab



2. Go to main **Attachment Tab** above for functionality (page 50)

Quote: Evaluations & Preference - Not used by the State

Quote: Reminders

Reminders are a useful function of the application to send to a specific State user of BidBuy on a specific date.

1. Select **Reminders** tab
2. Select **Due Date**
3. Enter **Comments**
4. Select **Remind Whom** from drop-down list
5. Enter **Days Prior to Remind**
6. Select **Send Email** if desired
7. Click **Save & Continue** to save reminder
8. Click **Reset** to empty all fields not yet saved

See Bid Reminders Field Descriptions for Reminder tab field descriptions

To ensure that confidentiality is maintained based on the attached documentation. This is extremely important.

Bid Reminder Field Descriptions

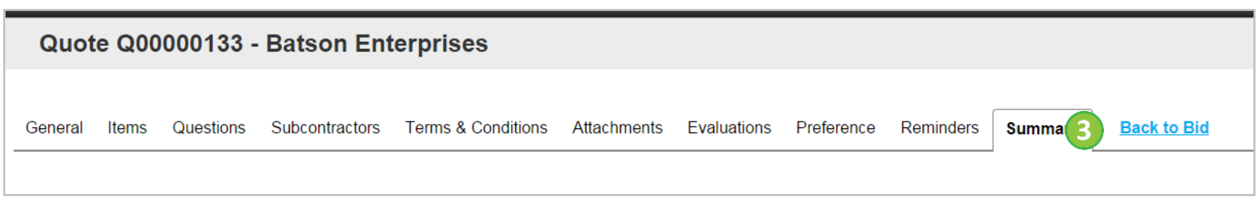
Field Name	Description
Due Date	Date set for task completion

Field Name	Description
Remind Whom	Identifying the user who is to receive the reminder
Days Prior to Remind	The number of days prior to the Due Date the reminder is given. “0” will post the reminder on the due date.
Date Completed	The Date that the user has marked the reminder to be accomplished
Send Email	Option to send email on the Days Prior to Remind
Date Entered	Date the reminder was created
Entered By	The user who created the reminder

Quote: Summary Tab

1. Select **Summary** sub-tab
2. Scroll-down to the bottom and click **Submit Quote**

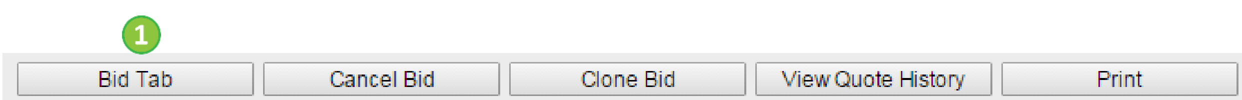
3. Click **Back to Bid**



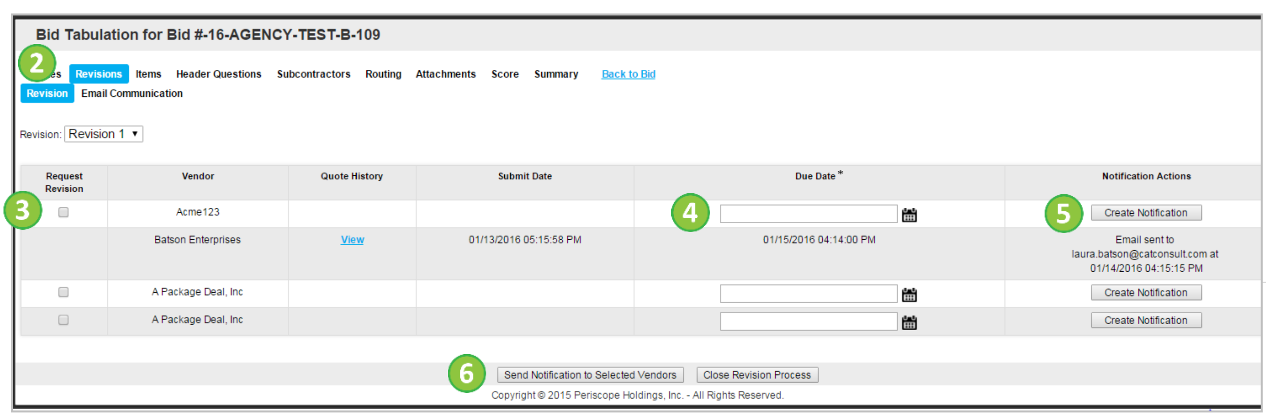
Bid Tab: Revisions - Not used by the State

The agency can send the bidders requests for revisions.

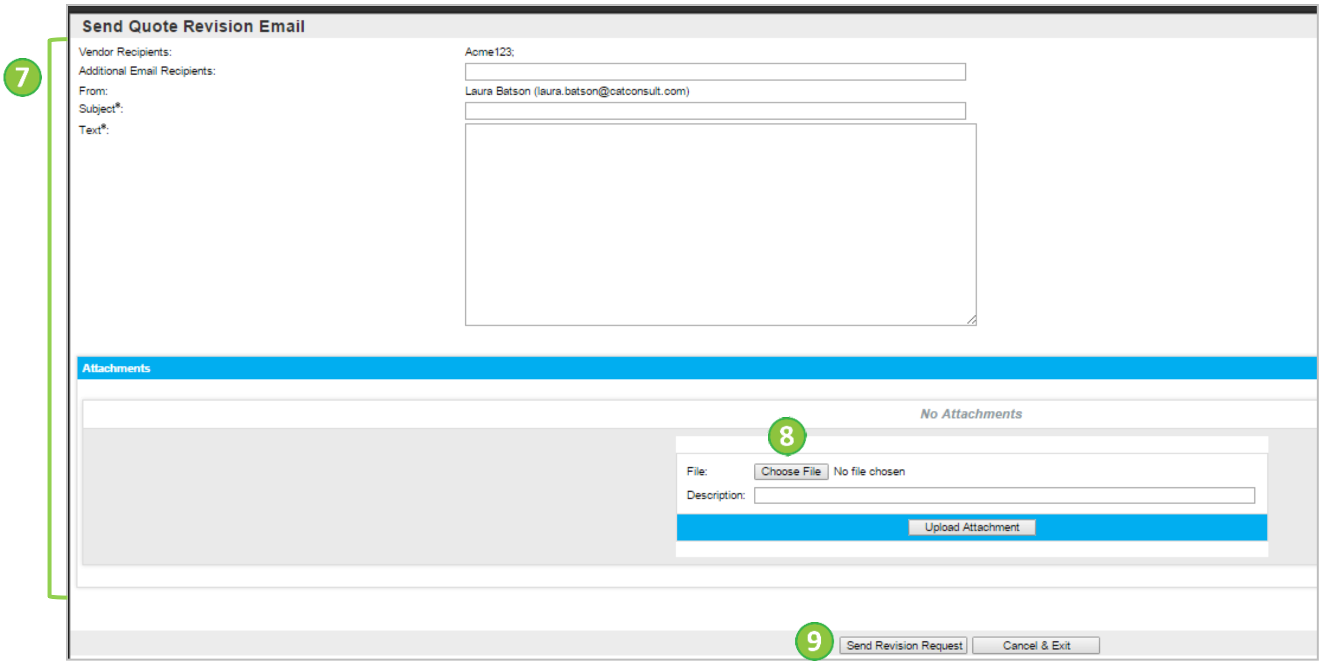
1. To begin the process, from the bid’s summary page, scroll to the bottom and click **Bid Tab**



2. Select **Revisions** tab
3. Select **Request Revision** for vendor(s)
4. Enter **Due Date**
5. Click **Create Notification** to send to that specific vendor
6. Click Send Notification to Selected Vendors to send same message to multiple vendors



7. Enter email content
8. Click **Choose File** to add a file
9. Click **Send Revision Request** to send the email



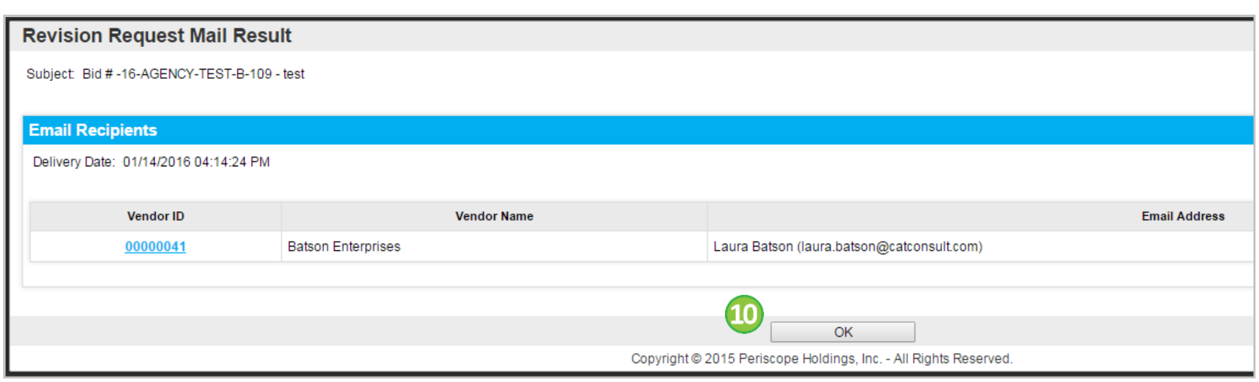
10. Click **OK** to send the email to vendor(s)

> **The agency is unable to tabulate the bid until the vendor(s) make their revisions and due date has pasted.**

Create Manual Quote

Manual Quotes may be created by the user for vendor responses that are not electronically submitted in BidBuy.

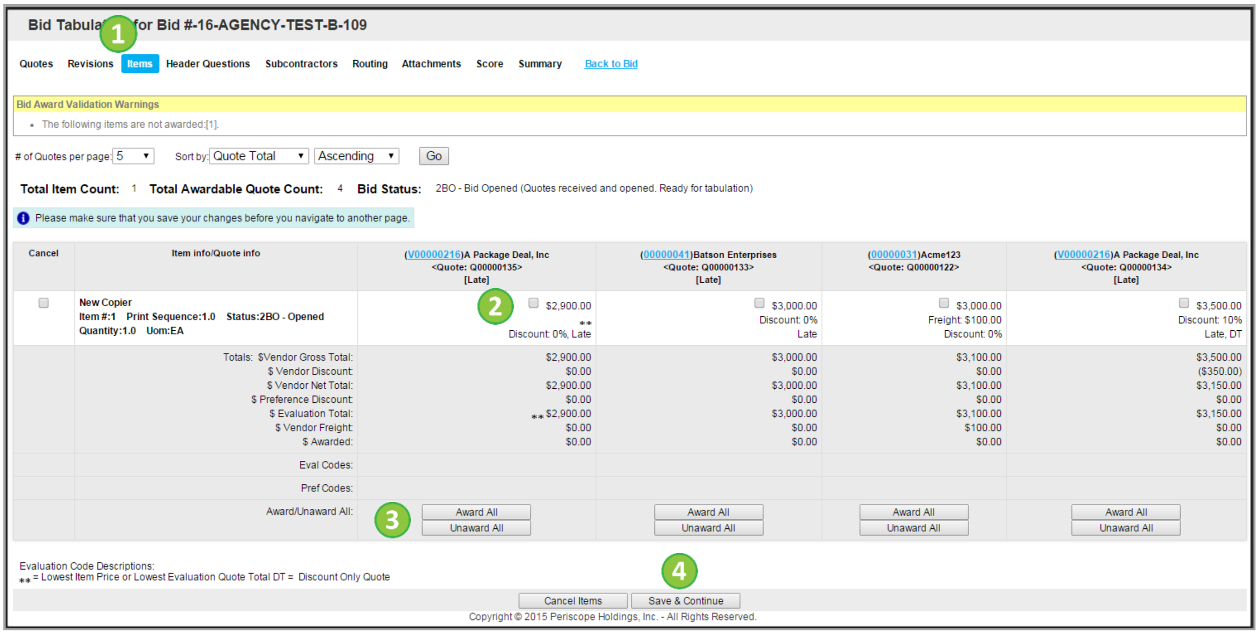
To begin the process, from the bid’s summary page, scroll to the bottom and click **Bid Tab**. This will start the bid tabulation process.



Bid Tab: Items Tab

The Items Tab shows pricing by item for all quotes. BidBuy signifies the lowest quote with two asterisks (**).

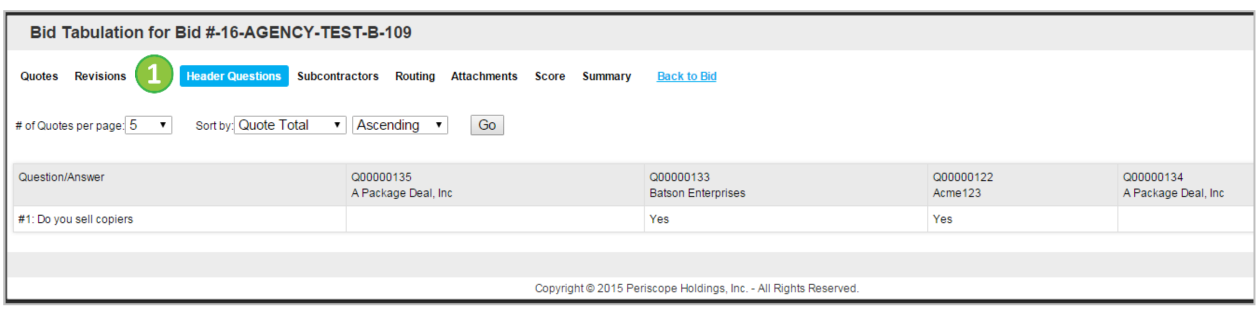
1. Select **Items** tab
2. Select checkmark box next to each vendor to award items individually
3. Select **Award All** under a vendor to award **all Items** to that vendor
4. Select **Save & Continue**



Bid Tab: Header Questions Tab

This tab summarizes the questions and the vendor's responses.

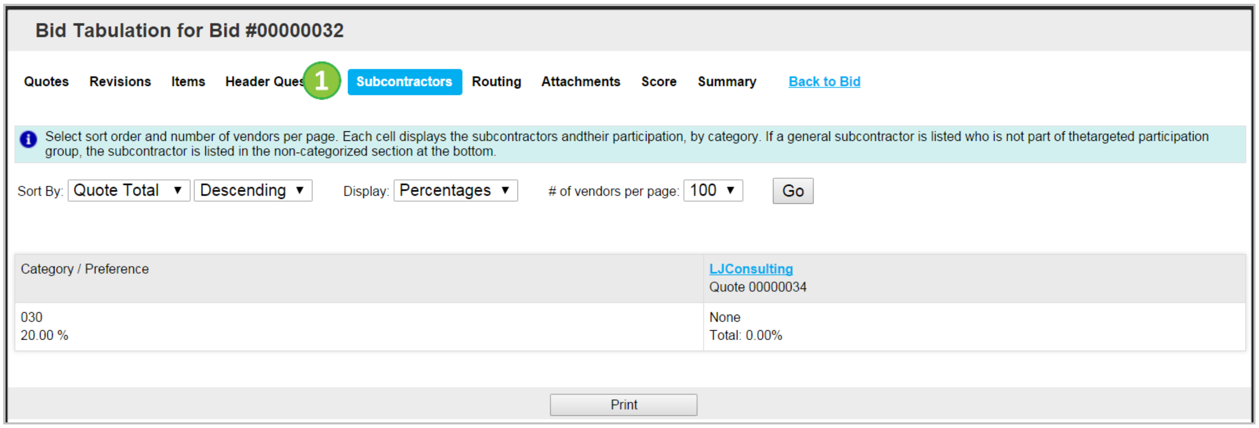
1. Select **Header** Questions to compare the vendor responses to each question



Bid Tab: Subcontractor Tab

This tab displays any subcontractors associated with a vendor

1. Select **Subcontractors** tab to view the vendor's responses regarding the subcontractor goals



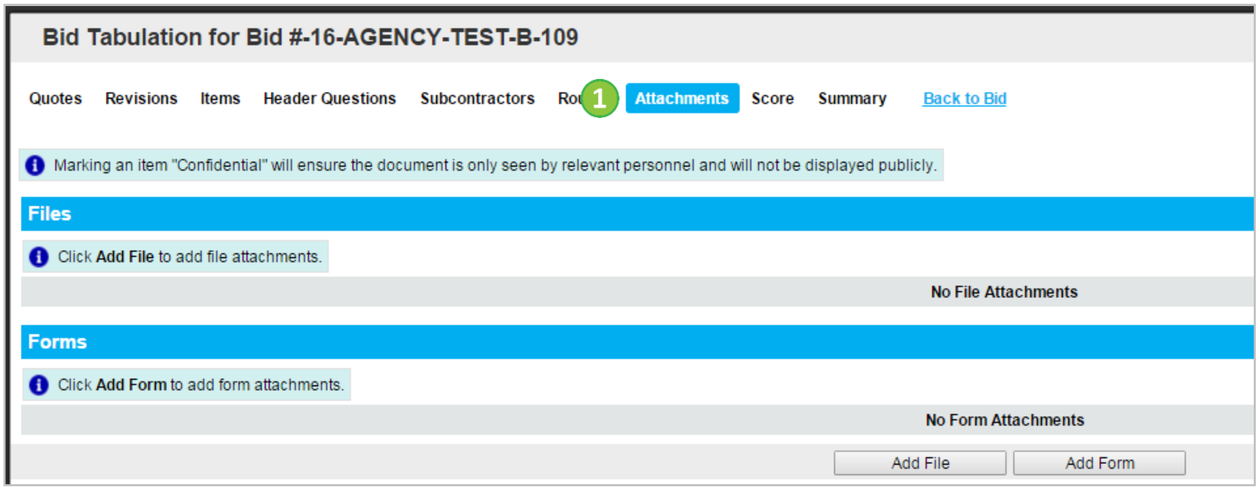
Bid Tab: Routing Tab

The routing that the Bid Tab must follow for approval is determined by the applicable approval paths. The approval path is displayed on the Routing Tab. This tab remains blank until an approval path is determined when the Bid Tab is submitted for approval.

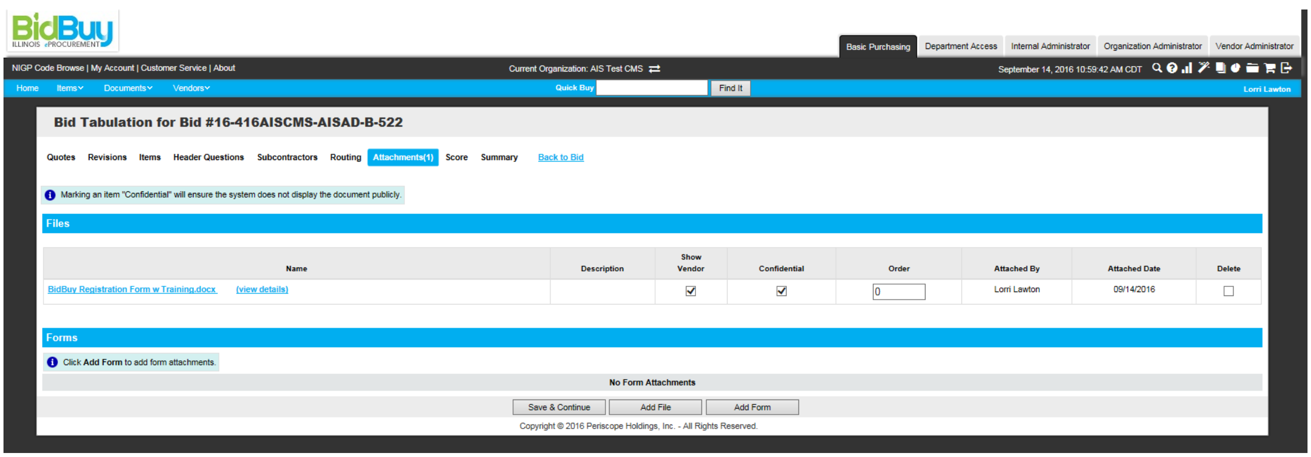
Bid Tab: Attachments Tab

This tab allows the agency to upload attachments and add forms related to the bid tabulation.

1. Select **Attachments** tab



2. Attach documents, including the Certifications and Financial Disclosures. Check **Confidential** when attaching Certifications, Disclosures or other documents requiring confidentiality. (See Appendix B – Forms By Process for instructions on whether to "Show" attachments to the public.)



Bid Tab: Score Tab (Not used by the State)

The Scorecard allows an agency to assess the bids that have been submitted based on criteria the agency establishes. Once the criteria are established, the purchaser forwards a request to a group of approvers who use those criteria to judge (score) the bid.

Scoring criteria is based on a weighting system of a 100% total, meaning that, each criterion you setup will have an importance value (or "weight") assigned to it as a percent, and the total of all criteria combined will equal exactly 100%. The scores against those weights are recorded numerically 1-99.

There are three sub tabs within the Score tab:

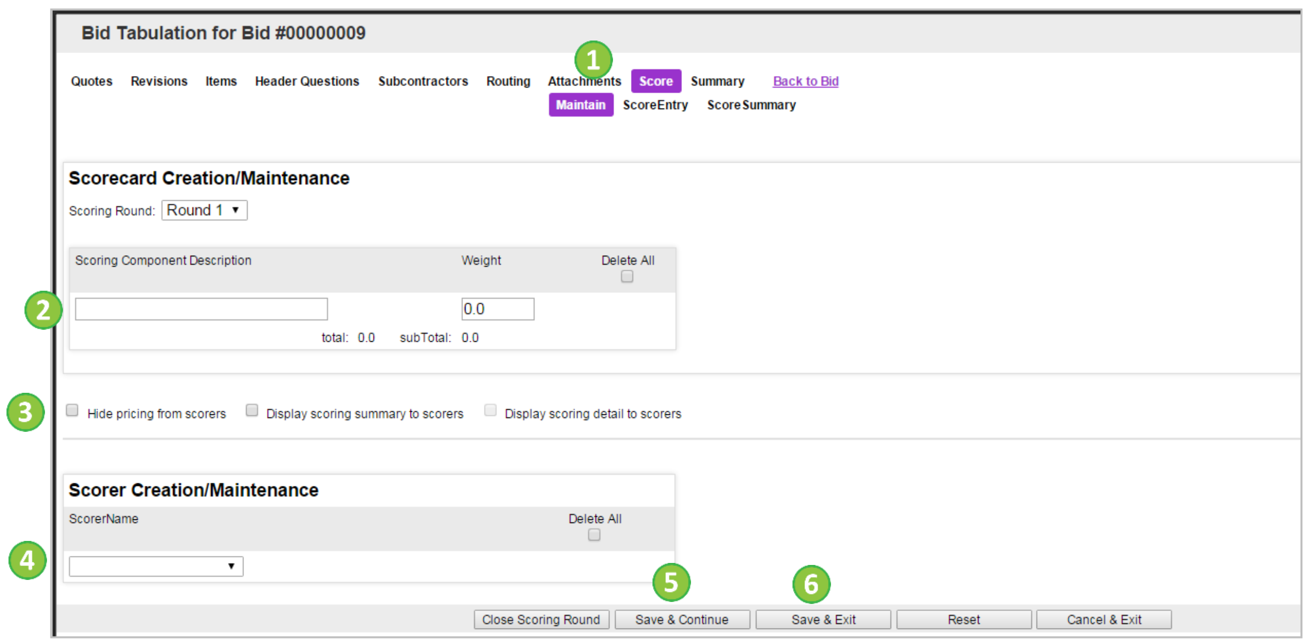
- **Maintain –** Where the buyer builds the scorecard with criteria, weights and selects scorers
- **Score Entry –** Where the scorers enter the scores for the vendors
- **Score Summary –** The tabulation of those scores

Maintain Tab - Setup up Weights and Scorers

1. From the **Bid Tab**, click **Score** tab and then **Maintain** tab
2. Enter **Scoring Component Description** and **Weight**

See Score- Maintain Field Descriptions for details on the fields. The weights must add up to 100%. The user can setup multiple rounds of scoring.

3. Select different options
4. From drop-down select **Scorer Name**
5. Click **Save & Continue** to add more components or more scoring names
6. Once updated, click **Save & Exit** to start the first round of scoring



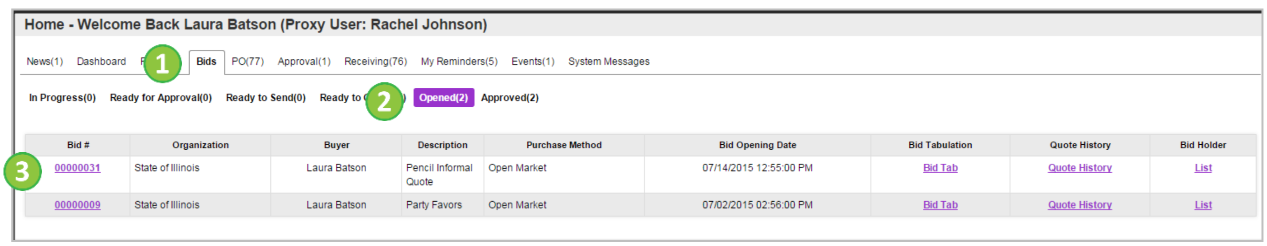
Bid Score - Maintain Field Description

Field Name	Description
Scoring Round	Automatically populated when a scoring round is closed.
Scoring Component Description	The criteria you want the scorers to score.
Weight	Importance, measured by percentage.
Hide Pricing from scorers	Select to hide pricing from the scorers.
Display Scoring Summary to scorers	Select to display scoring summary to scorers.
Display Scoring Detail to scorers	Select to display scoring detail to scorers.
Scorer Name	BidBuy user you wish to designate as a scorer for this bid.

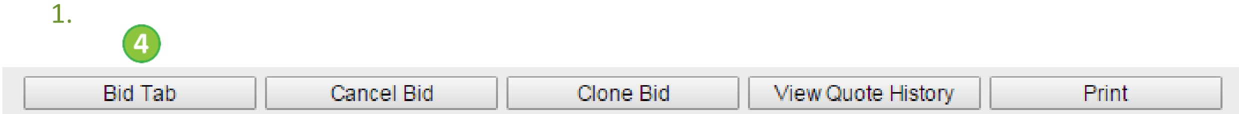
Score Entry

Once the scorers are informed to score the vendors, the user can go to their Home Page and find the Bid under the Bid tab.

1. From the **Home** Page, click on **Bid** tab
2. Click **Opened** tab
3. Click on **Bid #**

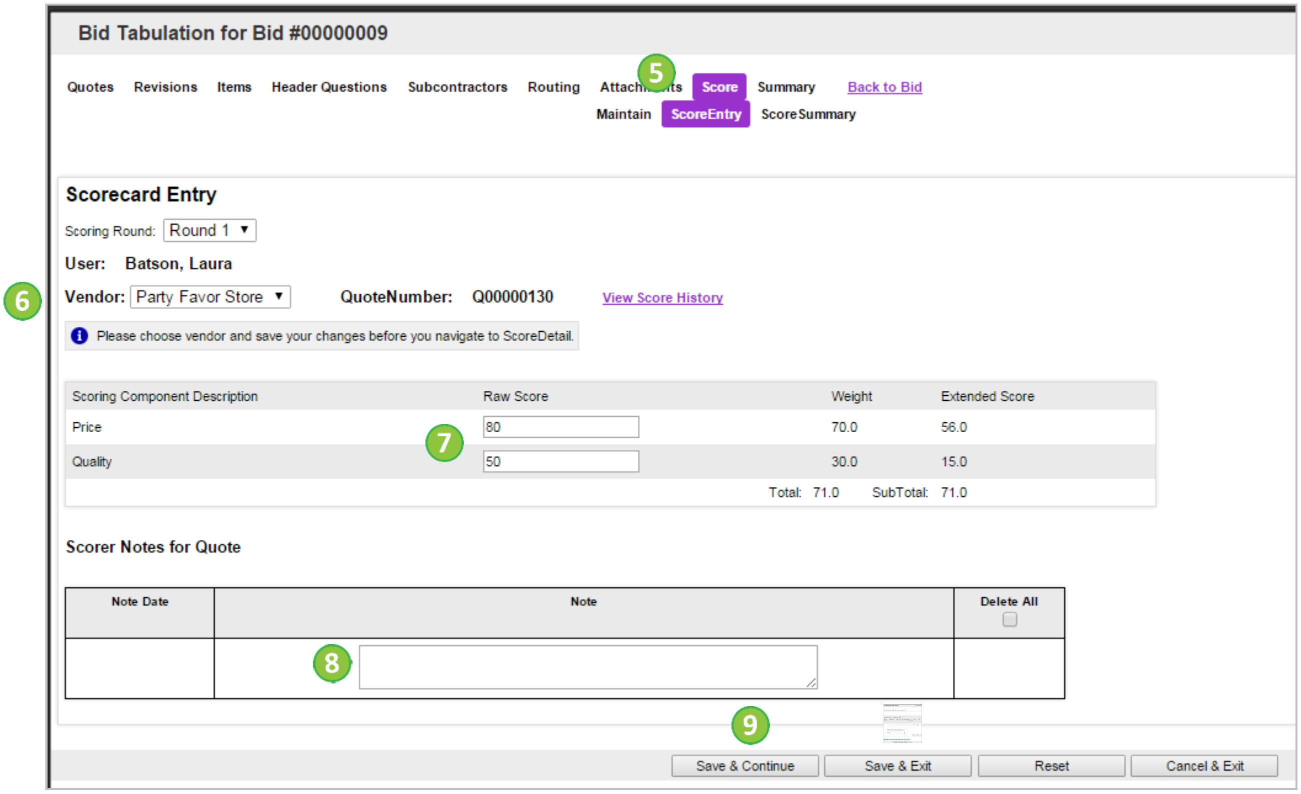


4. Scroll to the bottom on Summary tab and click Bid Tab
1.



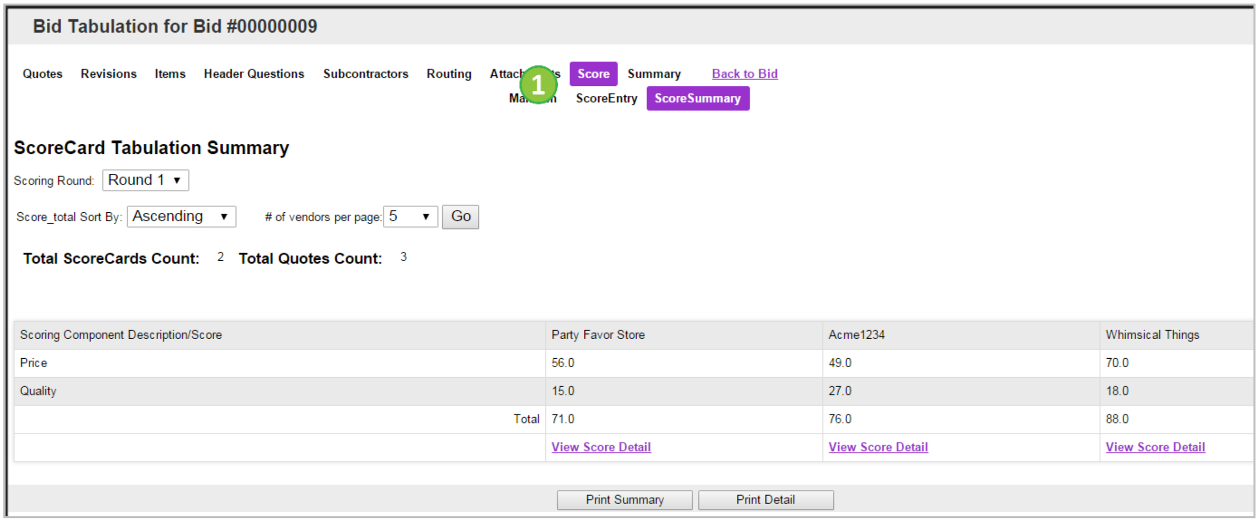
5. Click **Score** tab and then **Score Entry** tab
6. Select **Vendor** from drop-down
7. Input your **Raw Scores** from 0 to 100
8. Enter **Notes**
9. Click **Save & Continue** to add another note or select another vendor

10. Click **Save & Exit** to complete



Score Summary

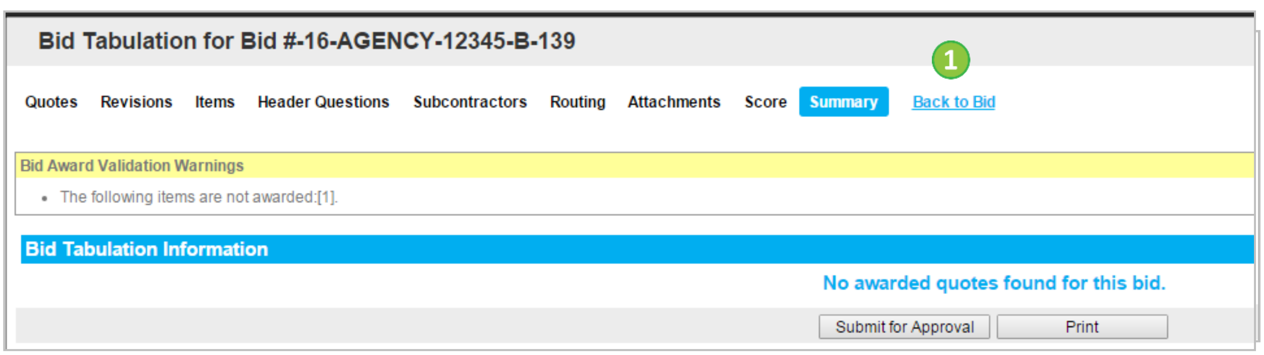
1. From the **Bid Tab**, click **Score** tab and then **Score Summary** tab



Submit Bid for Approval, Award, and Publish

When an approval path is configured for the Bid Tab, the approvers will attach to the Bid Tab and it will move to Ready for Approval status.

1. Select **Summary** tab
2. Scroll-down to the bottom and click **Submit for Approval**



3. Click **Continue** to send approver email to approve

When there is no approval path configured, the user is prompted to select:

- **Automatic Approval** – Selecting this will move a document to Ready for Purchasing status. This option is visible when there are no configured approval paths on the document.
- **Manually Add Approvers** – Requires the user to choose from a drop down list with individuals designated as approvers. The user selects an individual; clicks add approver and then save the approval (see example below).

1. Select **Manually add approvers** to add additional approvers

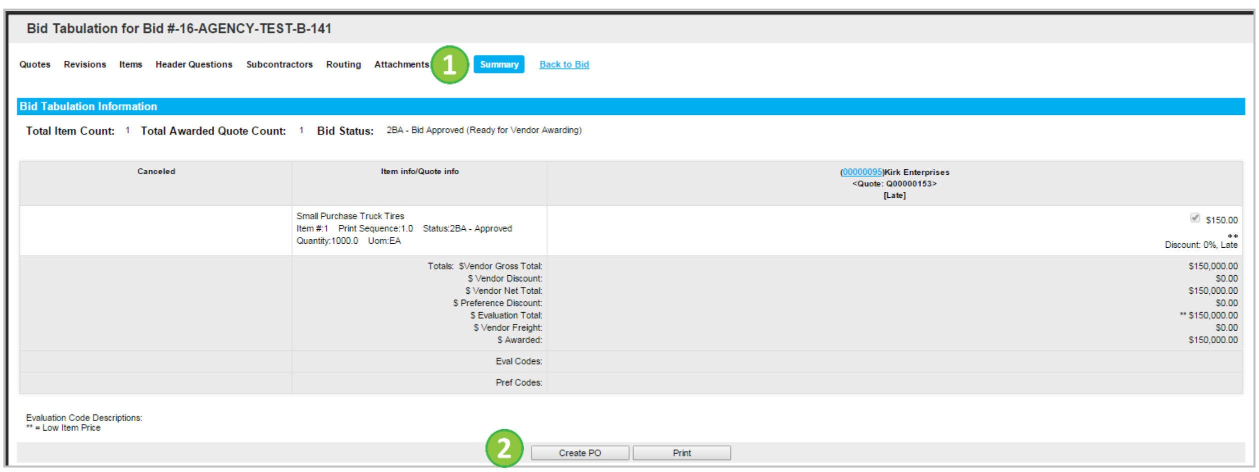
2. Select **Approvers** from drop-down list and click **Add Approver**
3. Click **Save & Continue** to continue
4. Click **Cancel & Exit** to exit

Convert Bid to Purchase Order

Once the award is selected and approved, the BP user can convert the solicitation into a Purchase Order. The information can be updated and added to on the resulting Purchase Order.

Bid Tab: Summary Tab

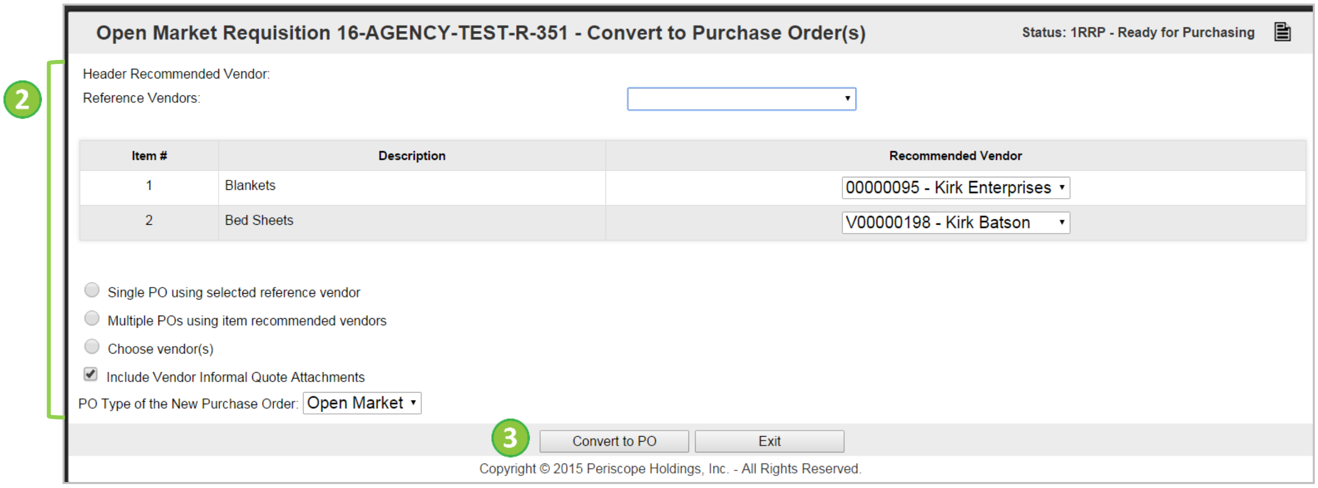
1. Select **Summary** tab
2. Click **Create PO** to send to a purchase order



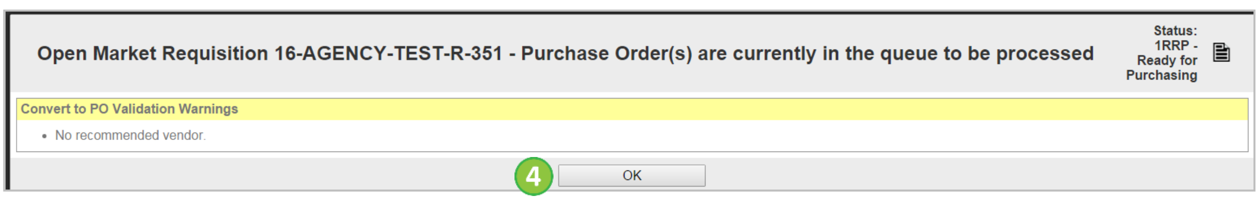
Process Purchase Order

Upon approval of the Requisition or Bid document, the user will process the Purchase Order to submit to the vendor. Small Purchases < $10,000 may convert the Requisition directly to PO. Small Purchases > $10,000 must be processed using the Bid document.

1. Verify and update Information, for more than one vendor the system will create more than one PO, one PO for each vendor selected

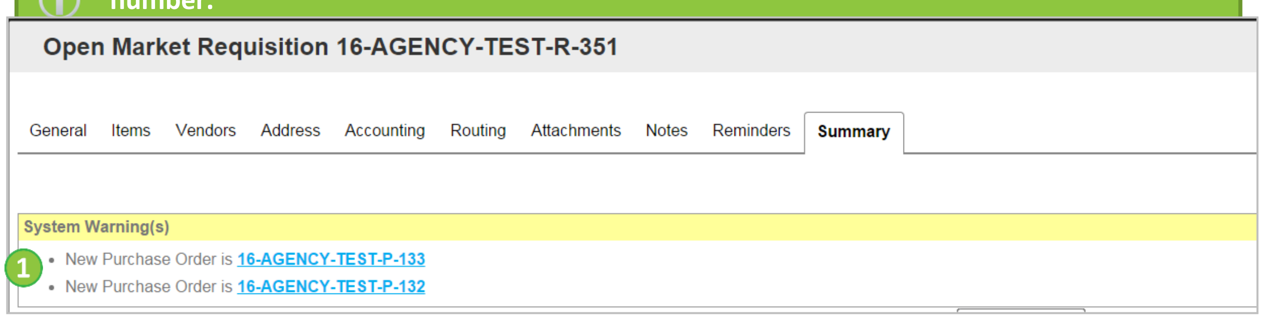


2. Click **Convert to PO**



3. Click **OK.** If the user does not select a preferred vendor this warning appears.

The system takes the user back to Summary tab and displays the Purchase Order(s) number.

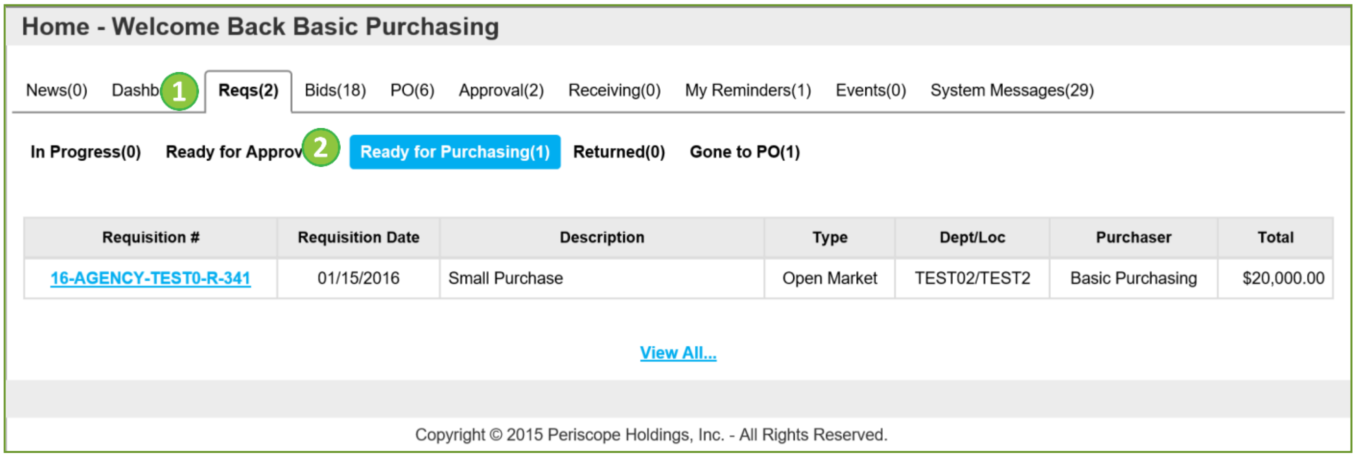


1. From the Requisition Summary Tab, click Purchase Order **link**

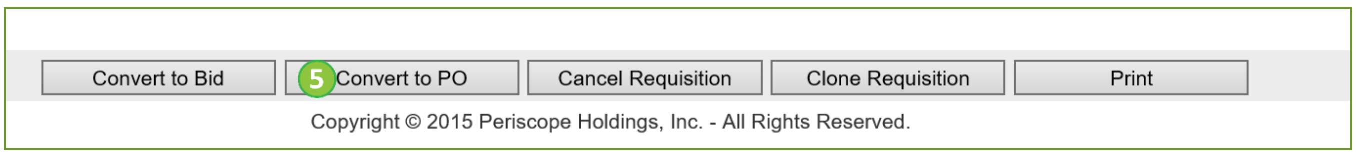
Alternative way from the BidBuy Home Screen to locate a Purchase Order:

1. Click on the **Reqs** Tab
2. Click on the **Ready for Purchasing** sub-tab, only approved requisitions will display

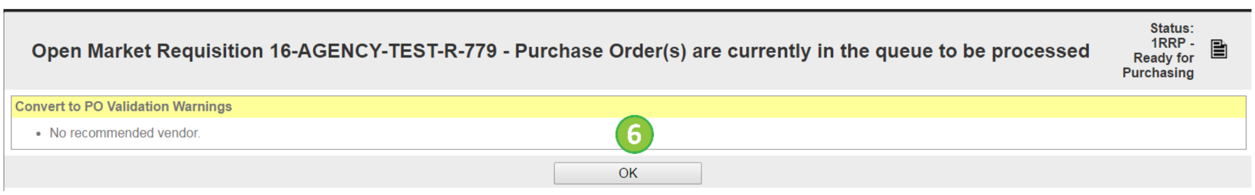
3. Click on the **Requisition #** to be converted



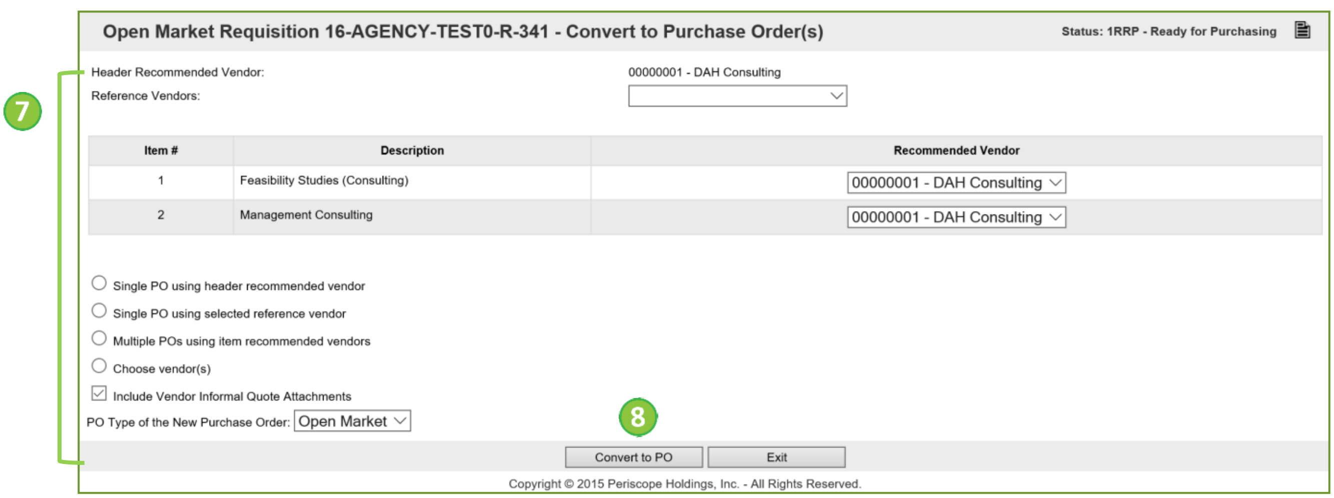
4. Navigate to the bottom of the Summary screen
5. Select **Convert to PO** to convert requisition to an Open Market Purchase Order and award the recommended vendors.



6. Click **OK** on the pop up screen to continue



7. Enter selections from radio button list
8. Click **Convert to PO**.



9. Click **Continue**

Purchase Order Conversion Field Description

Field Name	Description
Single PO using header recommended vendor	If user selected one recommended vendor
Single PO using selected reference vendor	If user wants to select from the list of vendor from Requisition
Single PO using item recommended vendor	If user wants to select by item each vendor
Choose vendor(s)	If user wants a lookup screen for vendors
Include Vendor Informal Quote Attachments	If user wants to copy vendor attachments to PO
PO Type of the New Purchase Order	For small purchases, this is Open Market

Add Missing Information and Update Tabs

Information from the Requisition is carried over into the Purchase Order. There are some fields that do not relate to the Requisition but are necessary to have for the Purchase Order. These fields are flagged General Validation errors and need to be updated by the user. For an Open Market Purchase Order, two mandatory updates are presented:

- General Tab: The following required fields are missing: SPO Name, State Use Rationale, Purchase Order Begin Date, and Purchase Order End Date.
- Items Tab: The following required fields are missing: End Date for item.

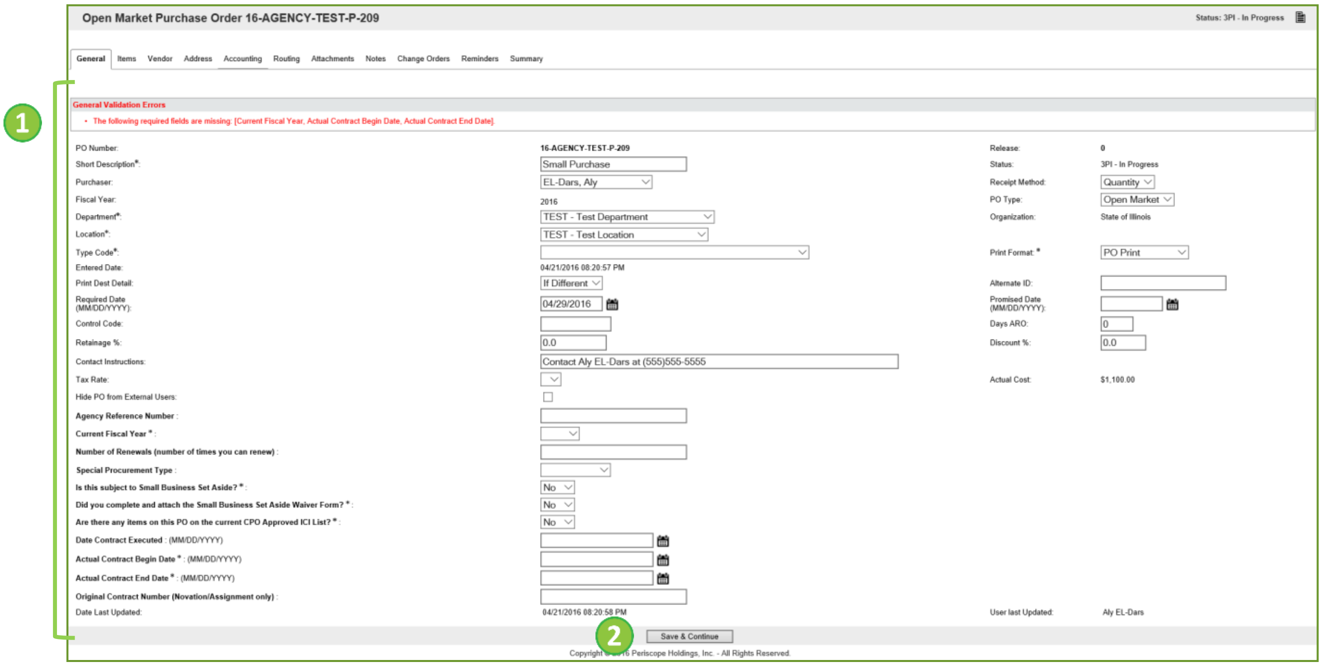
General Tab

Converted PO errors need to be addressed, errors appear in red

1. Update General information for the PO

See Purchase Order General Field Description Table. All fields with an Asterisk * are required.

2. Click **Save & Continue**



Errors detailing missing, required information are displayed in red and optional updates are flagged as warnings in yellow.

Purchase Order General Field Description

Field Name	Description
PO Number	This number is automatically generated when the user selects Save & Continue.
Short Description	Short Description helps the user identify or locate the document. Use complete words, not abbreviations. Start with alpha agency identifier, and then describe the item to be procured. Noun, Adjectives.
Department	The department that is managing the contract.
Location	The location within the department managing the contract.
Type Code	These are defined by each agency – See Custom Column List
PCard	Not used by the State
Print Format*	Use Default – PO Print
Entered Date	This will populate when the document is saved.
Print Dest	Use default.
Alternate ID	Agency defined alternate ID field. The length of this field is determined by system settings. The field length can be from 0 to 50 characters. CAUTION: the alternate id field may be used by interface processing. Beware deleting or changing data within the alternate ID field as it may cause invalid data or errors during the interface processes. **Not to be updated by the user.**
Required Date	The date and time by which the originator requested that delivery of the items on this Purchase Order be delivered. **This is typically defined at the contract, so no input is necessary.**

Field Name	Description
Promised Date	The date by which the vendor must deliver the goods. **This is typically defined at the contract, so no input is necessary.**
Control Code	Agency defined control code.
Days ARO	The number of days after receiving this order by which the vendor should deliver the goods.
Retainage %	Not used by State.
Discount %	Percentage of discount to be applied to PO.
Contact Instructions	Defines contact for the document.
Tax Rate	Not used by State
Actual Cost	The total cost of all the items on this Purchase Order, including any applicable tax, freight, or discounts.
Invoice Method	Not used by State
Receipt Method	Not used by State
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

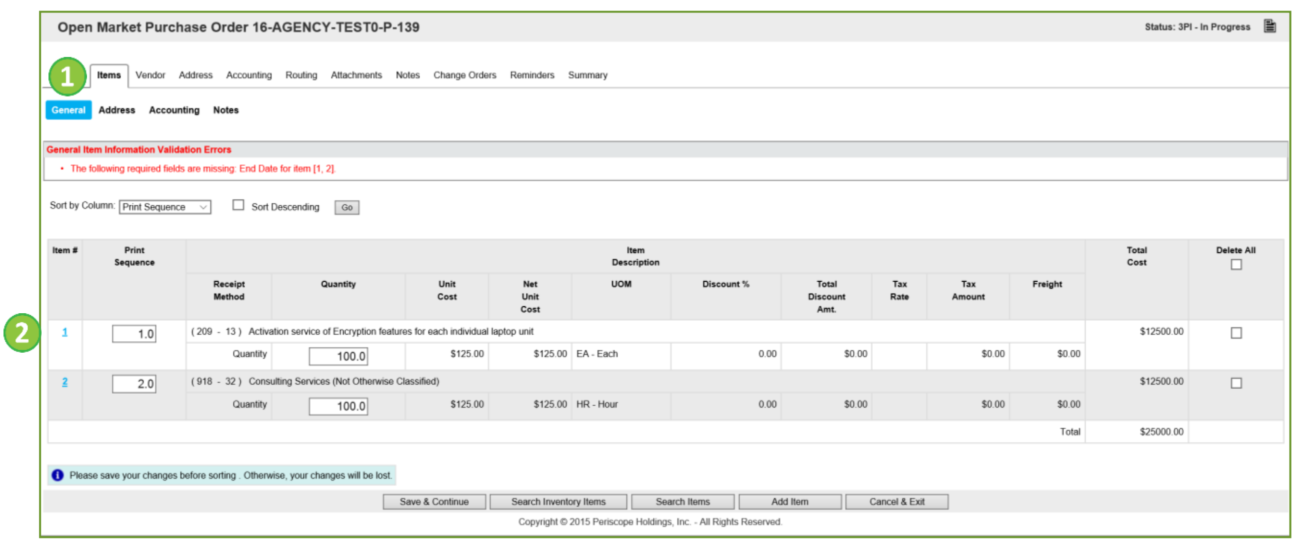
Items Tab

While the PO is in progress, the user is able to make any required modifications prior to submitting to the PO to the Vendor.

Items Tab: General

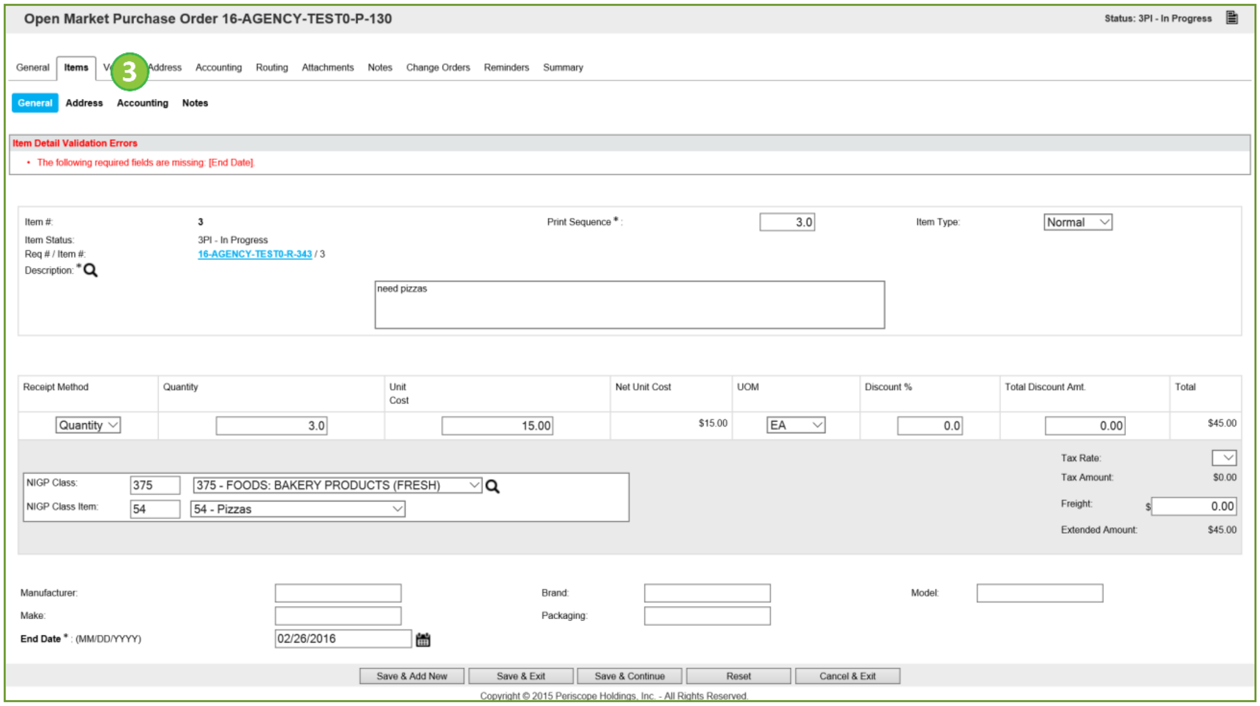
The items tab, general subtab contains the item information. Each additional subtab contains additional information that can be associated to specific items.

1. Select Items tab to review items in converted PO
2. Click Item # to update item information



3. Update information on Item Details Screen

4. Click **Save & Continue**



Purchase Order Item Field Descriptions

Field Name	Description
Item #	The order in which items are entered and are sequentially listed by BidBuy. This field cannot be modified by the user.
Print Sequence*	The order in which the items will be displayed. The item # is the default value for this field. The user can change this field if the print sequence needs to be different from the item number sequence.
Item Type	The user can select *Normal* or *Narrative* as the type. Selecting *Narrative* will make it a non-item addition where the user can type in text to appear on the purchase order.
Item Status	The status of the item on the Requisition.
Description*	The description of the item as defined by the user. Use complete words, not abbreviations, NIGP description, where applicable, broad description, then detail (e.g. Lettuce, spring mix; service example: Maintenance, Repair, HVAC.) NOTE: This is a searchable field for blanket contracts using Quick Buy. Use a searchable description.
Quantity	The Quantity of the item being requested. The user can type the amount of the item that is needed. The default value is zero.
Unit Cost	An estimated unit cost per item.
Net Unit Cost	Net unit cost per item is the Unit Cost – Discount % amount for unit cost.
UOM	User selects a unit of measure from the drop-down menu**. Reference Appendix A: Unit of Measure Descriptions, page 80.**
Discount %	Used if there is a percentage discount applicable to the item.
Total Discount Amt.	The Total Discount Amount, based on the Discount %. This value is calculated automatically by the system based on the Discount % value entered by the user. The value will not appear until the user tabs out of the Discount % field. The user can also manually type in a discount amount

Field Name	Description
	without entering a Discount %. The value must be negative for it to be deducted from the total.
Total	The Total Cost before tax. This value is calculated automatically. The formula used is: (Quantity x Unit Cost) – Total Discount Amount. The user cannot edit this field.
NIGP Class*	The three-digit Class Code associated with the item. Class Codes are listed on the pulldown menu in alphabetical order or through the search feature.
NIGP Class Item*	The two-digit Class Item associated with the item. Class items are listed on the pulldown menu in alphabetical order or through the search feature.
Commodity Code	Completes the full 11-digit NIGP code
Tax Rate	The State is not using Tax Rate.
Tax Amount	The State is not using Tax Amount.
Freight	The amount of Freight applied to this item.
Extended Amount	The Total Extended Amount of the item. This value is calculated automatically. The formula used is: Total + Tax Amount + Freight. The user cannot edit this field.
Manufacturer	Optional field.
Brand	Optional field.
Model	Optional field.
Make	Optional field.
Packaging	Optional field.
Receipt Method	Not used by State
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

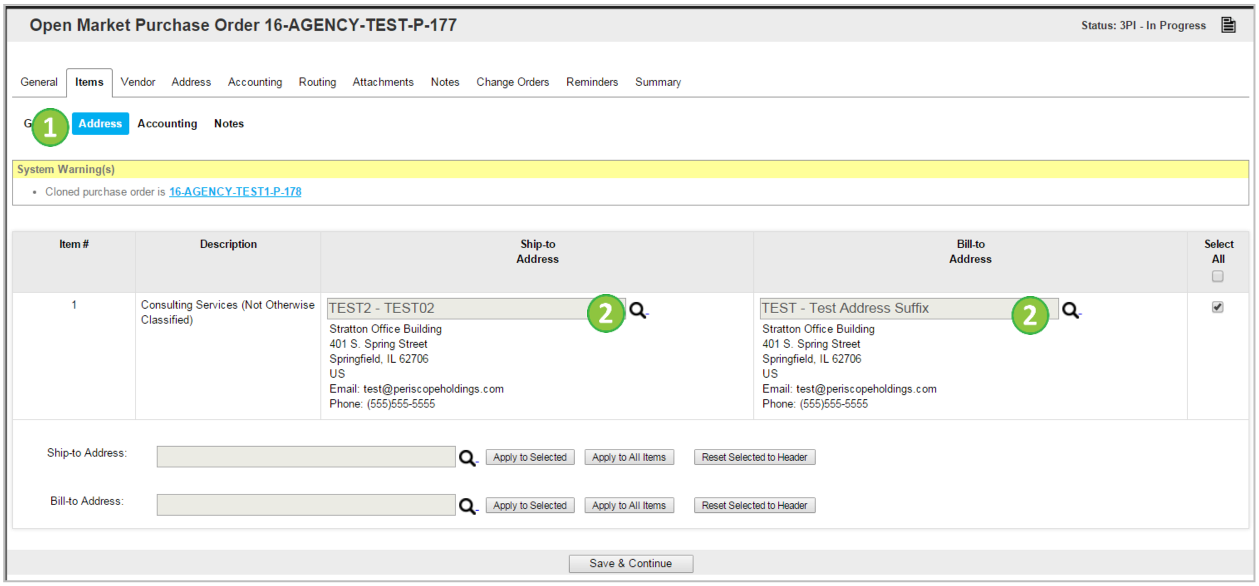
Items Tab: Address

This allows shipping and billing addresses for specific items. To assign shipping and billing addresses for all items go to the main Address tab for the purchase order.

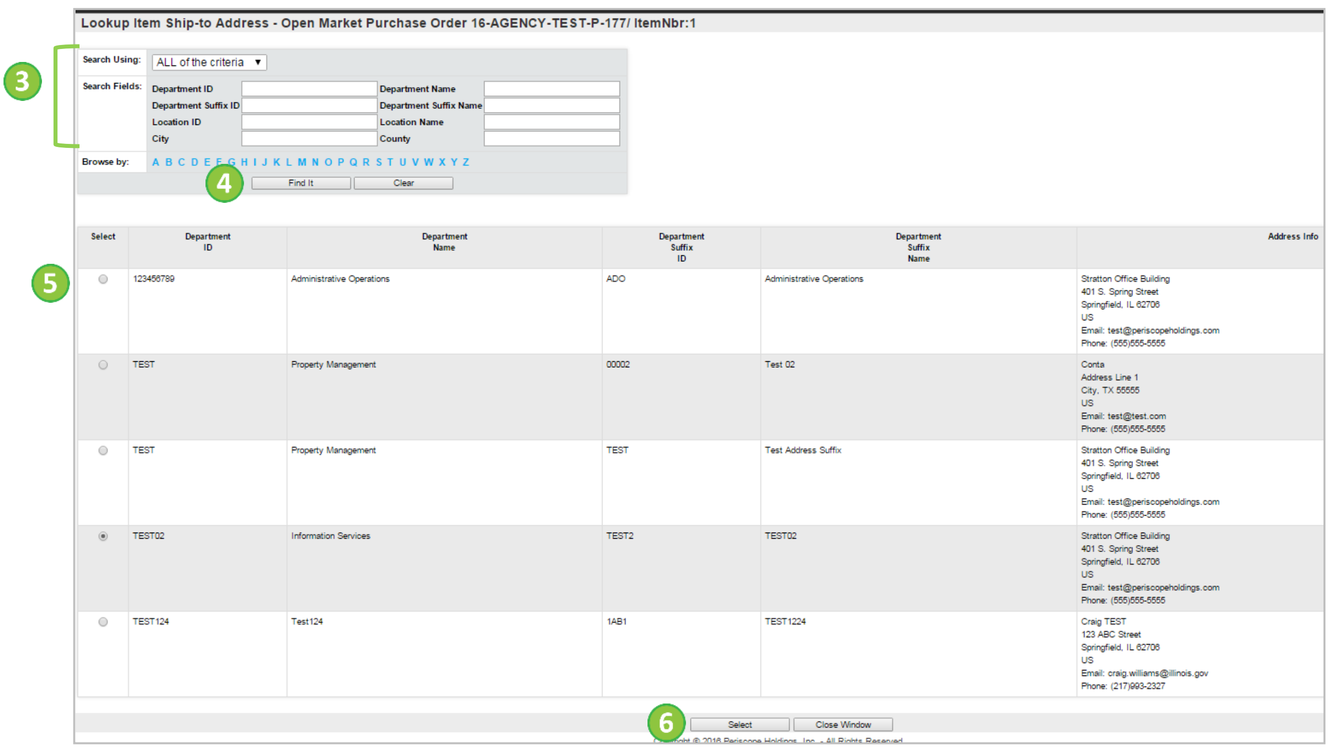
1. Select **Address** sub-tab

> **Default address information from the item master displays.**

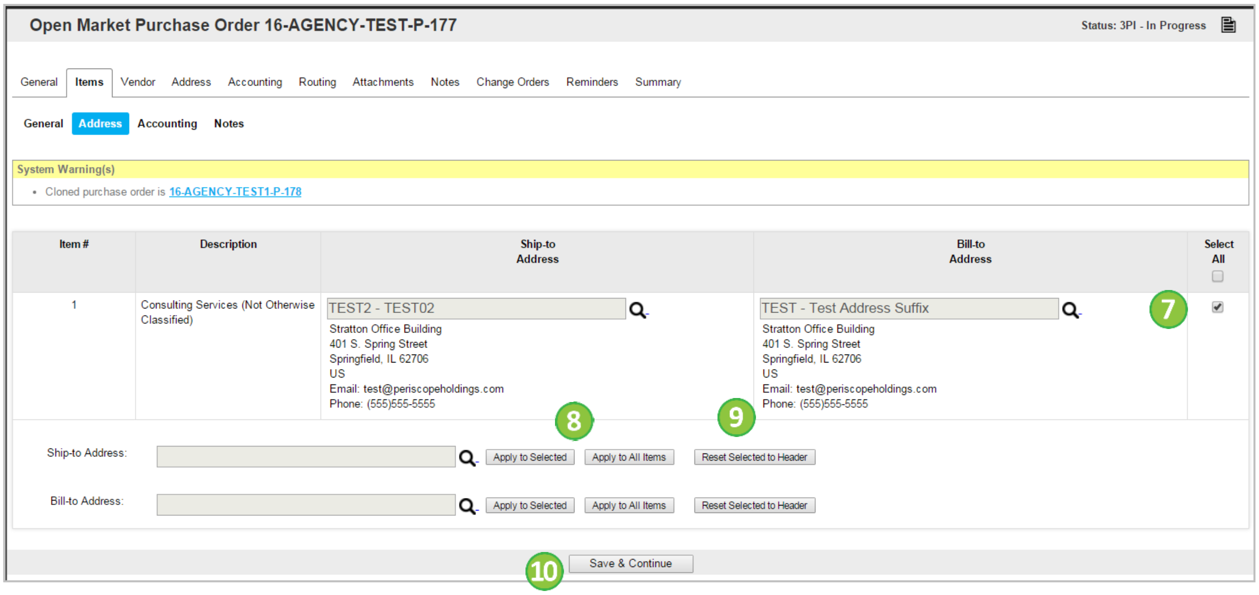
2. To change **Ship-to** or **Bill-to-Address**, click to search for new address 🔍



3. Enter Search Criteria
4. Click **Find It**
5. Select a new address
6. Click **Select** to update address



7. Select item(s) to change address (Ship/Bill To Address)
8. Click **Apply to Selected** to apply changes to only selected items or click **Apply to All Items** to apply changes to all items
9. Click **Reset Selected to Header** to reset all addresses to default from **Item Master**
10. **Save & Continue** to save changes and continue



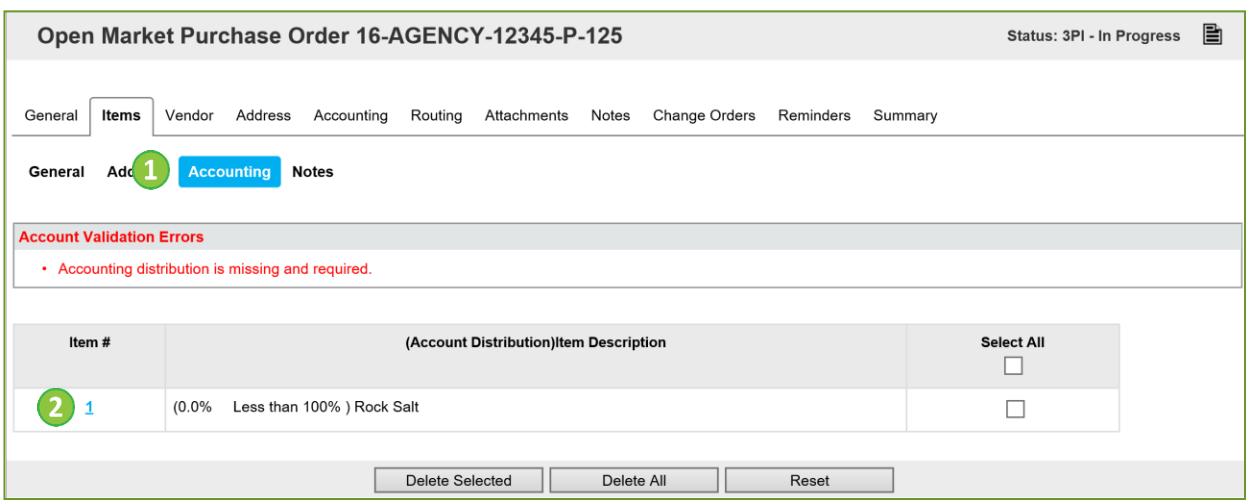
Items Tab: Accounting (Open Market & Release only)

The Item's Accounting sub-tab allows the user to enter accounting information to specific items. To add the same accounting information to all items, go to the main Accounting tab for the purchase order.

1. Select **Accounting** sub-tab

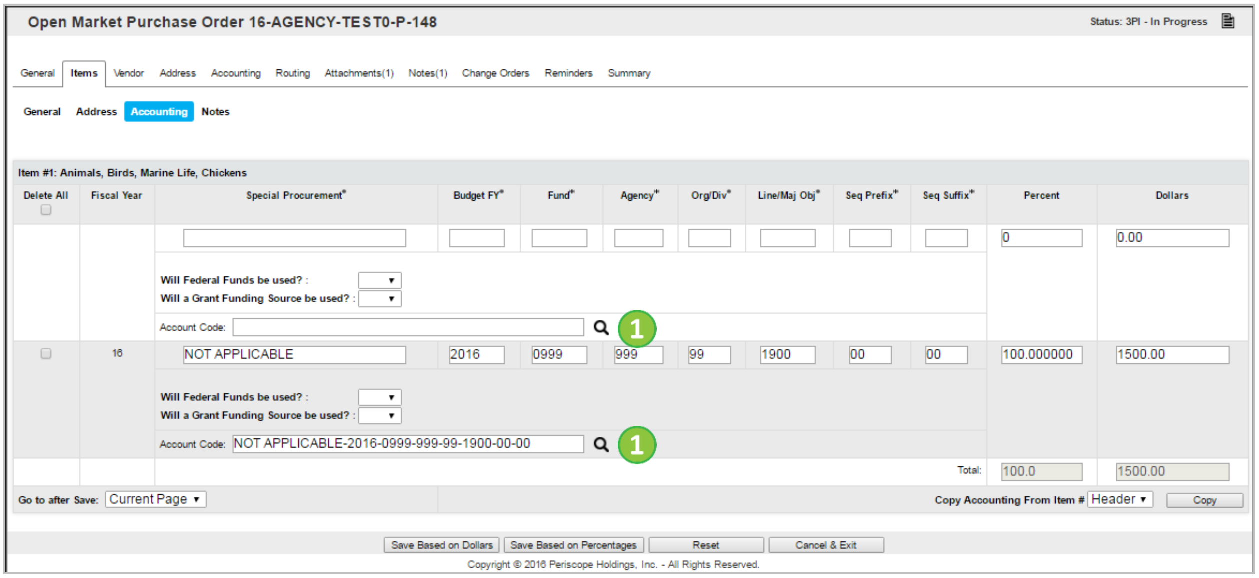
Default accounting information from the item master displays.

2. Select **Item #** to update accounting information

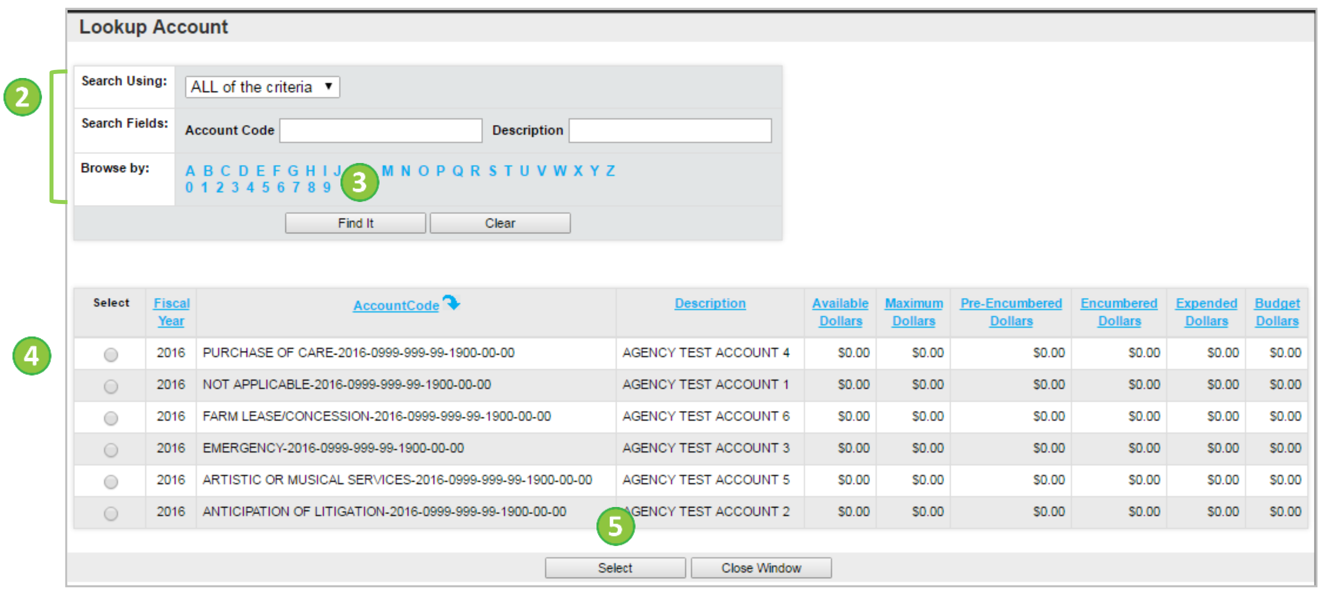


Add or change Account Code

1. Click to search for **Account Code**

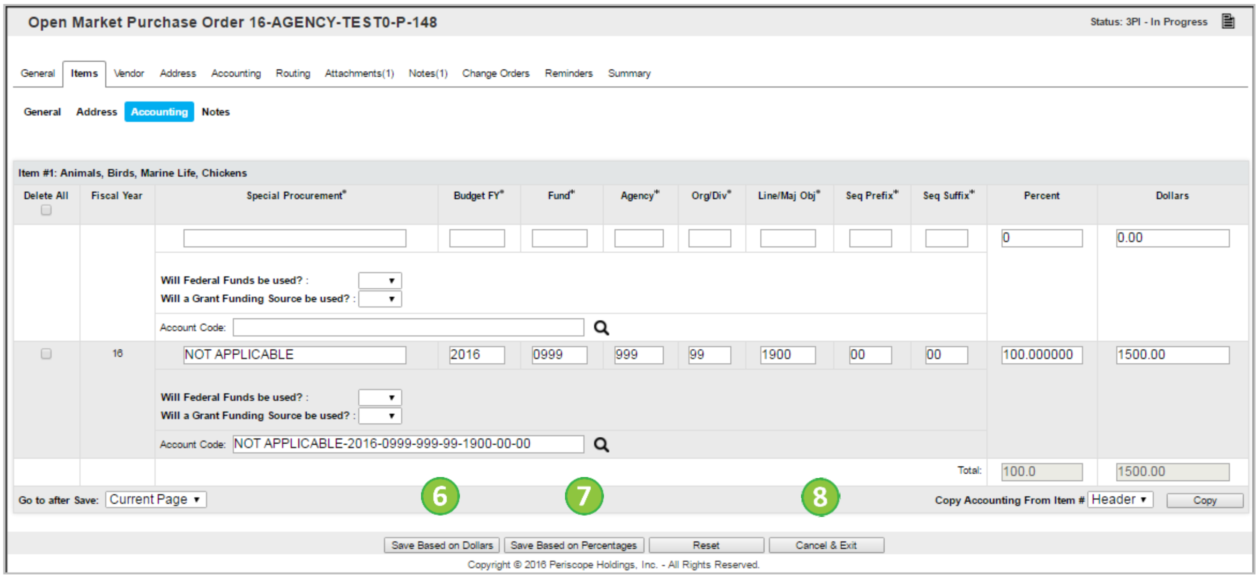


2. Enter search criteria
3. Click **Find It**
4. Select **Account Code**
5. Click Select



6. Click **Save Based on Dollars –** to save based on dollar amount entered, or
7. Click **Save Based on Percentages –** to apply changes and save based on percentages entered

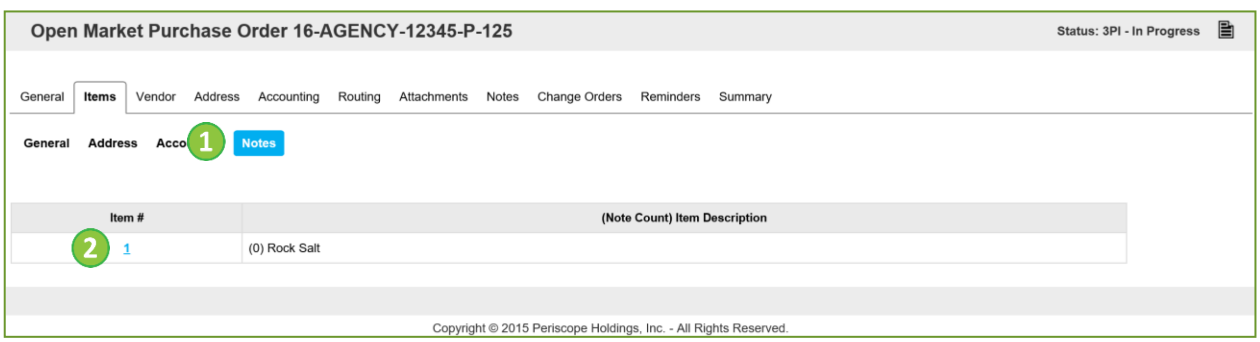
8. Click **Cancel & Exit** to exit without saving



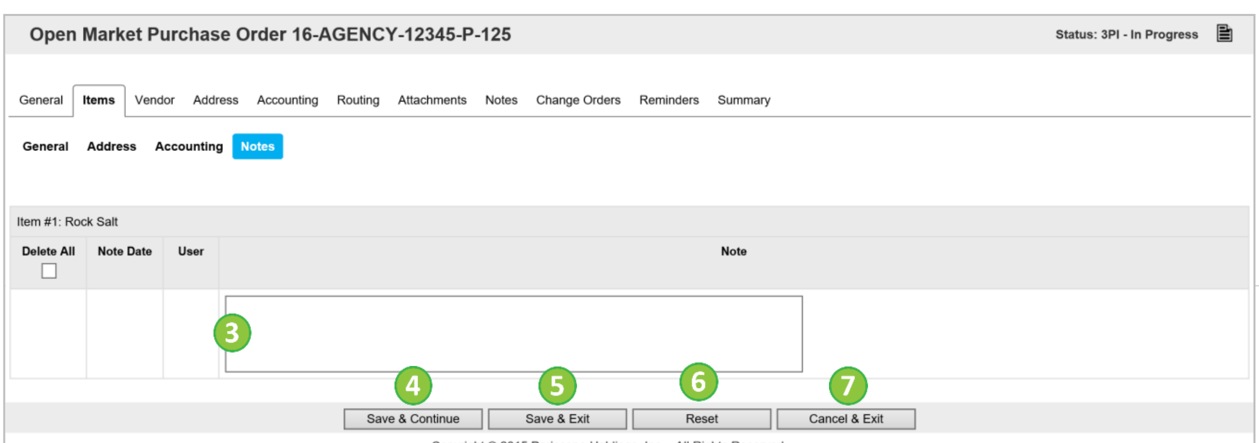
Items Tab: Notes

This notes section allows the user to add notes to specific items. To add notes to all items, go the main Items tab for the purchase order.

1. Select **Notes** sub-tab
2. Click **Item #** to update notes



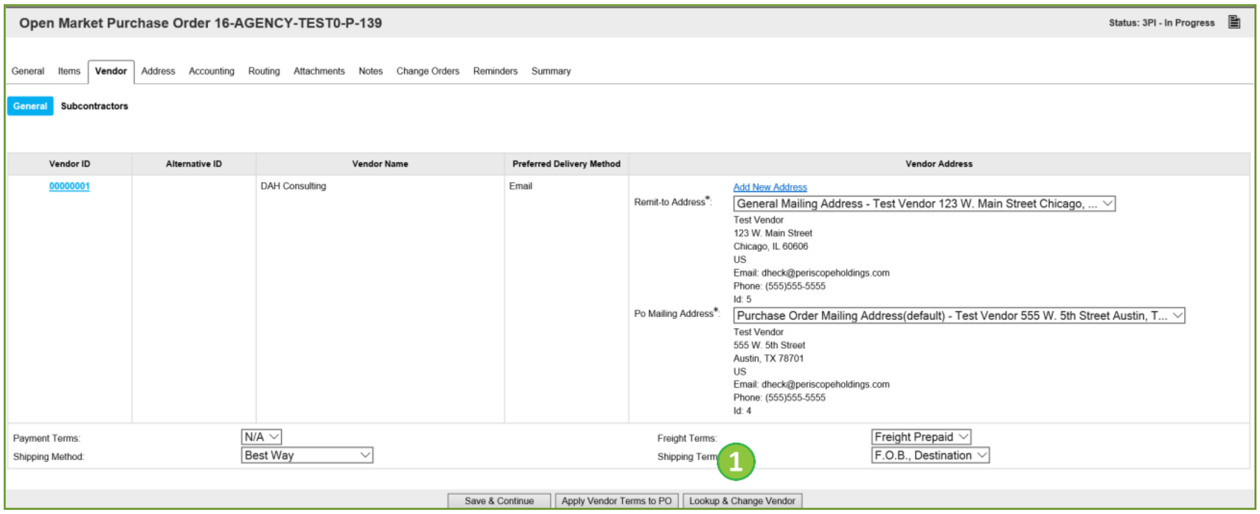
3. Update notes
4. Click **Save & Continue** to save notes and continue adding more notes
5. Click **Save & Exit** to add note and exit to PO
6. Click **Reset** to reset screen display
7. Click Cancel & Exit to exit without saving



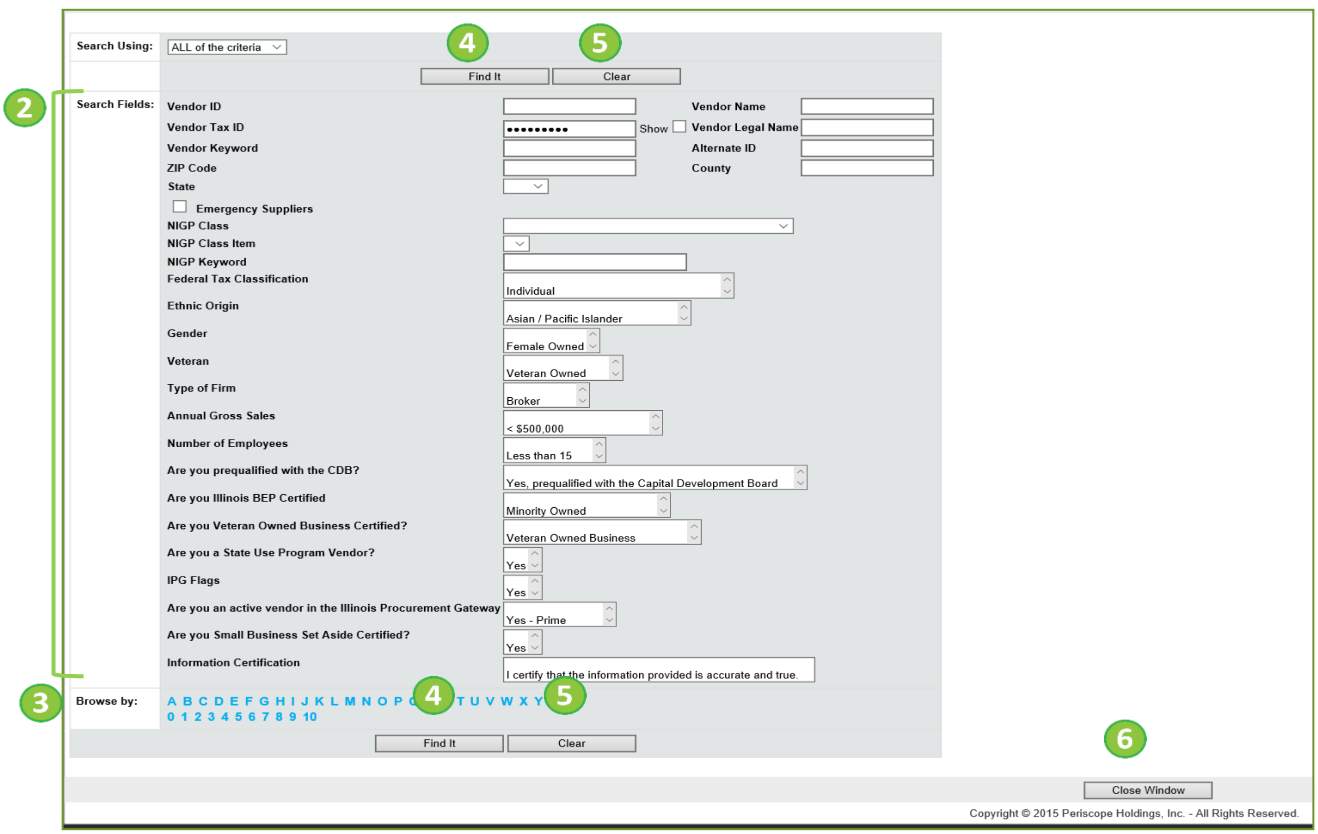
Vendor Tab

Vendor Tab: General

1. Under **General** tab, review vendors and click **Lookup & Add Vendor** if needed



2. Enter search criteria
3. To browse by the first letter of the vendor's name use **Browse By** and click on letter or numeric entry
4. Click **Find It**
5. Click **Clear** to restart search from scratch
6. Click **Close Window** to return to previous screen

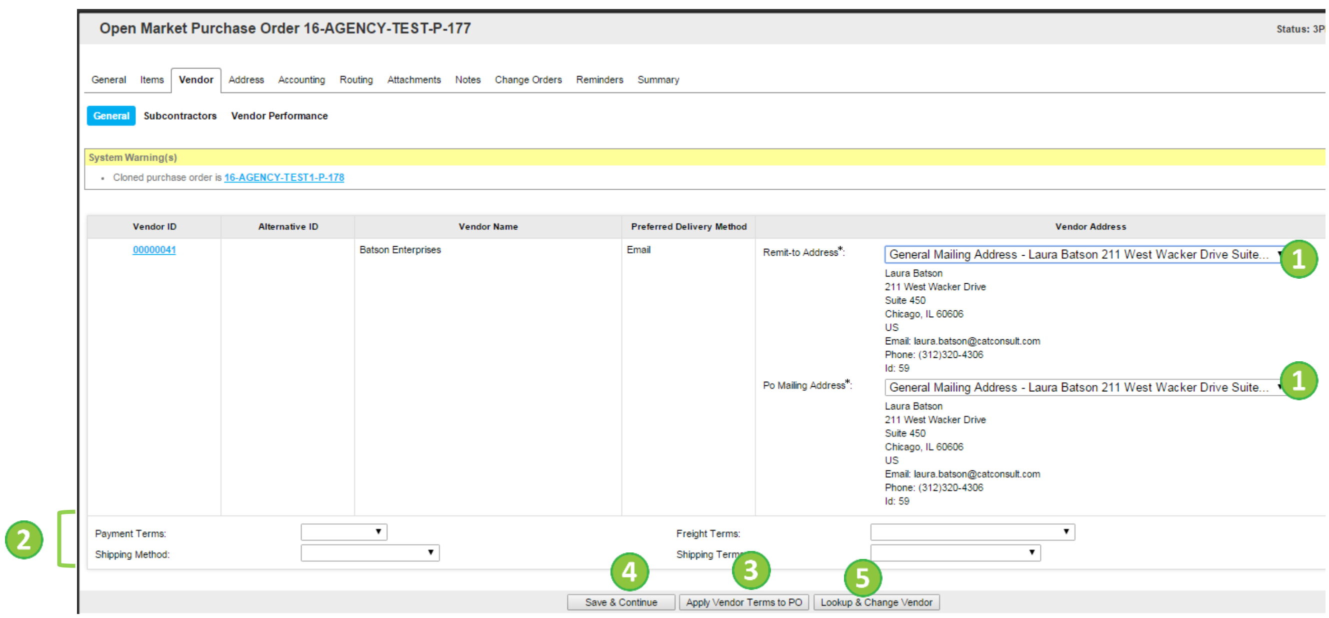


7. Select radio button next to Vendor ID

8. Click **Add Vendor**

Update vendor information

1. Use drop-down to change **Remit-to**- or **PO-Mailing Address**
2. Use drop-down to update terms
3. Click **Apply Vendor Terms to PO** to apply the vendor's preferred terms to PO
4. Click **Save & Continue** to save the selection
5. Click **Lookup & Change Vendor** to change vendor selection



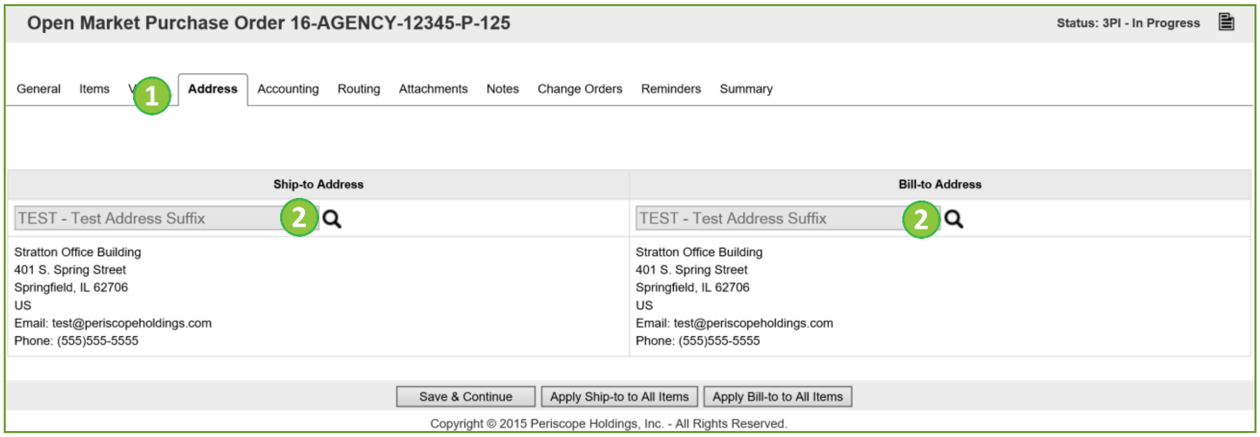
Vendor Tab: Subcontractor (not used by the State)

Address Tab

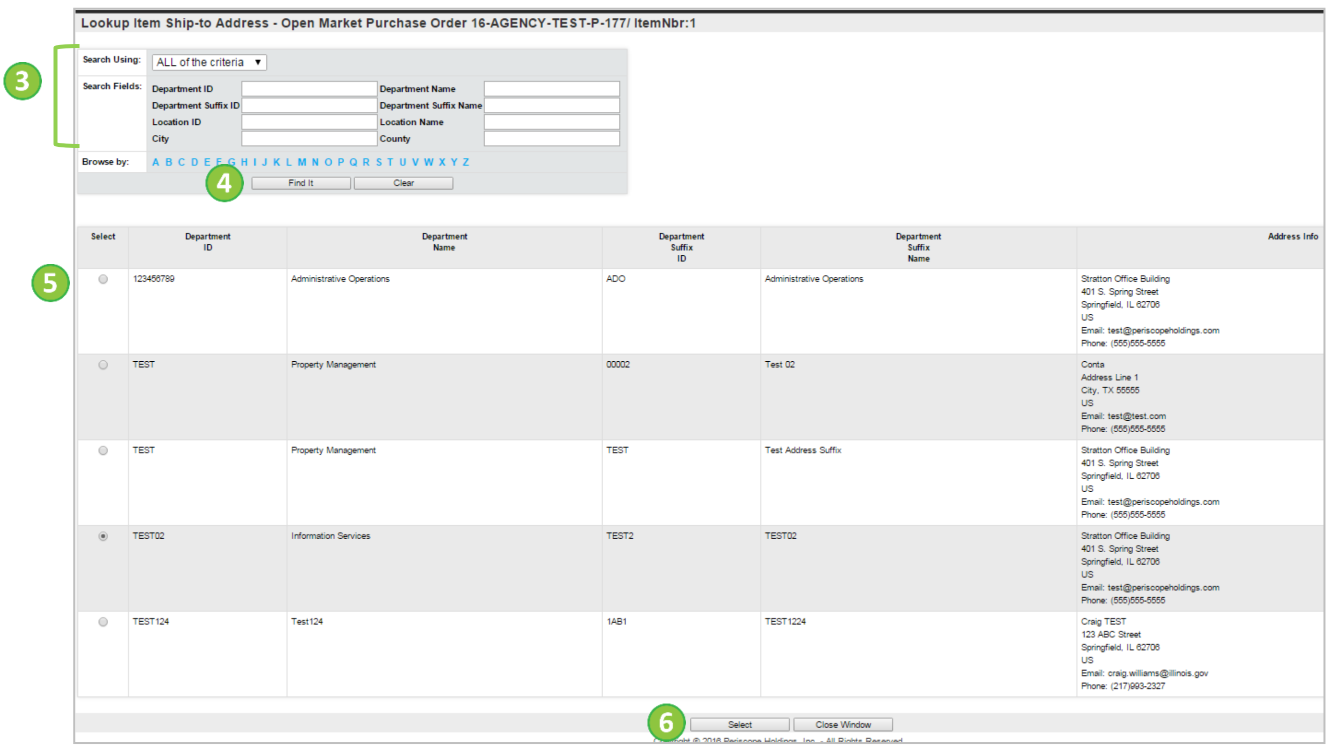
This is shipping and billing addresses for all items. To itemize shipping and billing addresses go to the Address sub tab under Items tab. Typically this would not be changed because it is the Requestors Address, not the buyers.

1. Select **Address** tab

2. To change **Ship-to** or **Bill-to-Address**, click 🔍 to search for new address

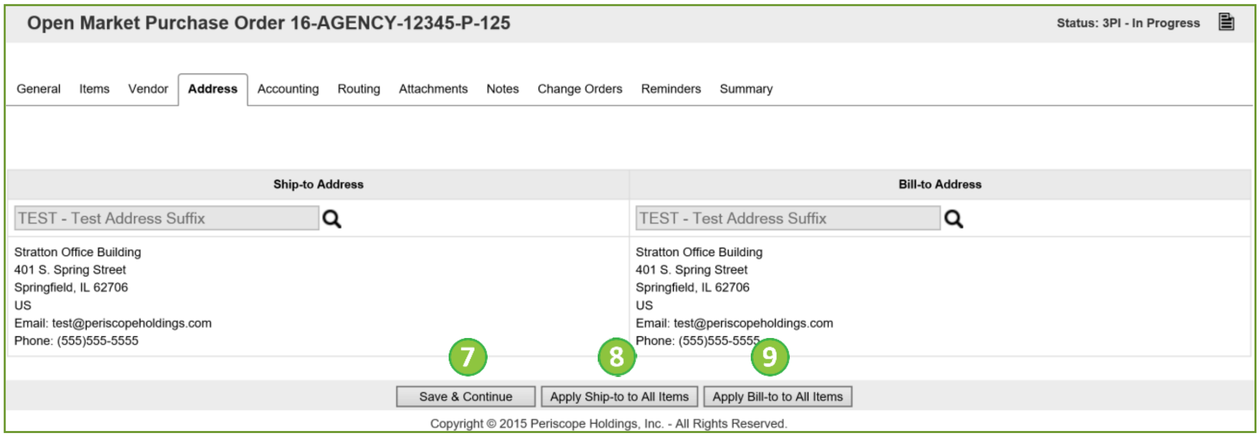


3. Enter Search Criteria
4. Click **Find It**
5. Select a new address
6. Click **Select** to update address



7. Click **Save & Continue** to save changes and continue
8. Click **Apply Ship-to to All Items –** to apply changes to ship-to to all items on PO

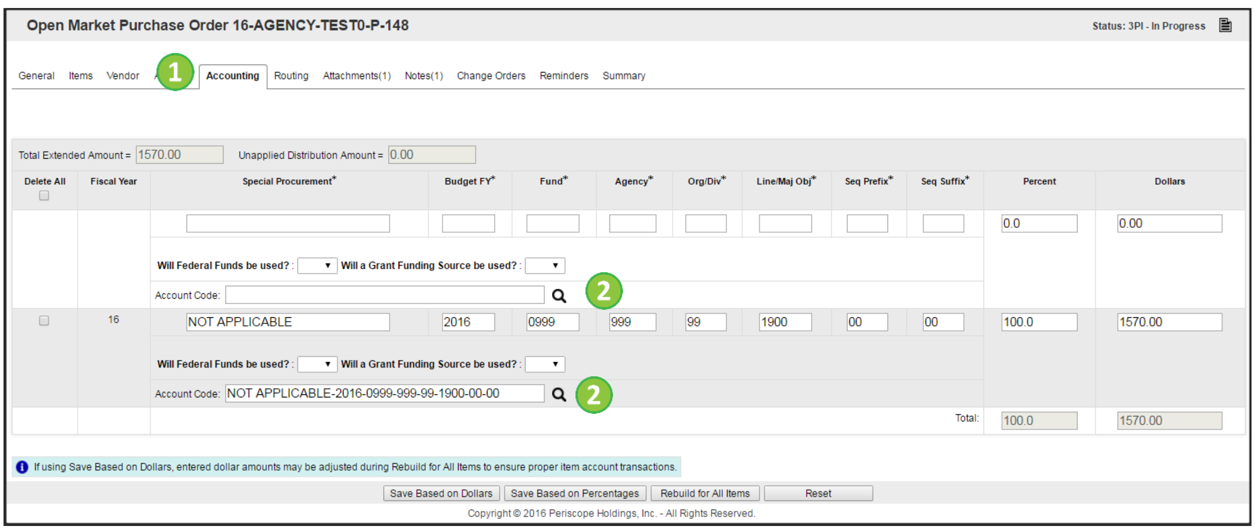
9. Click **Apply Bill-to to All Items** – to apply changes to Bill-to to all items on PO



Accounting Tab (Open Market & Release only)

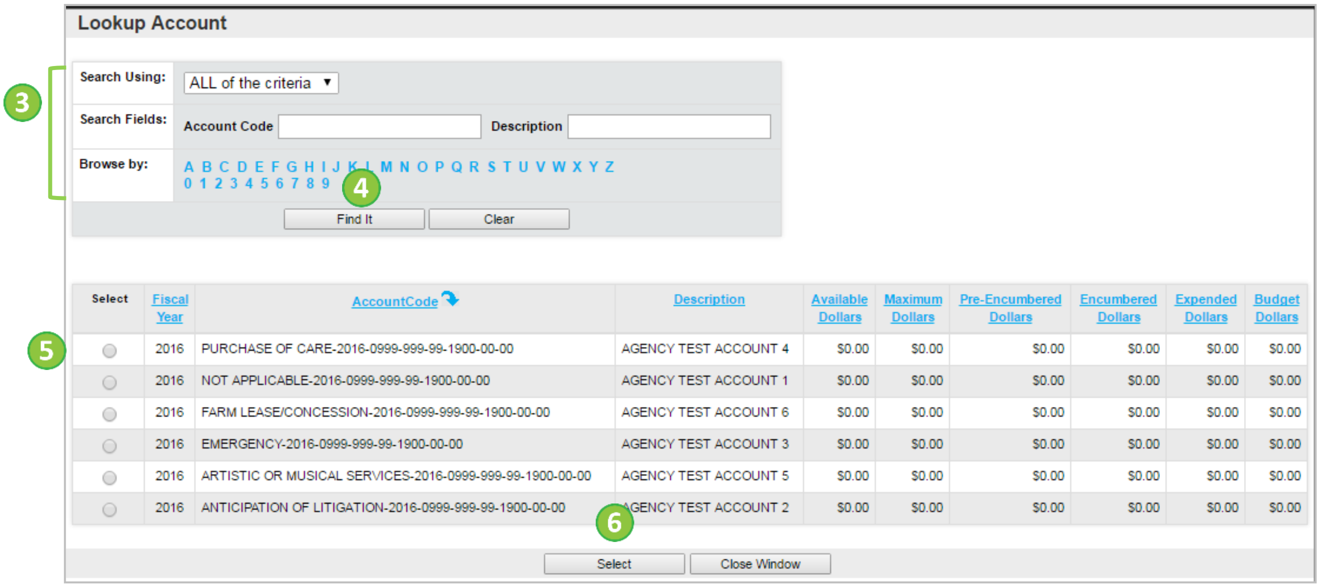
This is accounting information for all items. To itemize accounting go to the accounting sub tab under Items tab.

1. Select **Accounting** tab
2. Click to search for **Account Code** to add or update account

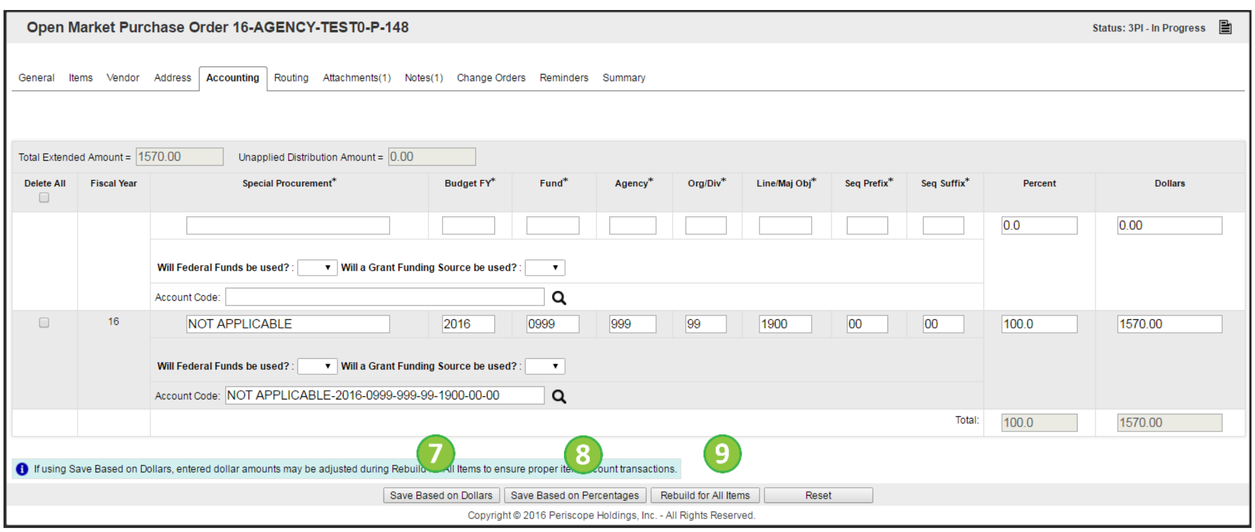


3. Enter search criteria
4. Click **Find It**
5. Select **Account Code**

6. Click **Select**



7. Click **Save Based on Dollars –** to save based on dollar amount entered, or
8. Click **Save Based on Percentages –** to apply changes and save based on percentages entered
9. Click **Cancel & Exit** to exit without saving



> **If the Rebuild for All Items is not completed, a PO cannot be submitted.**

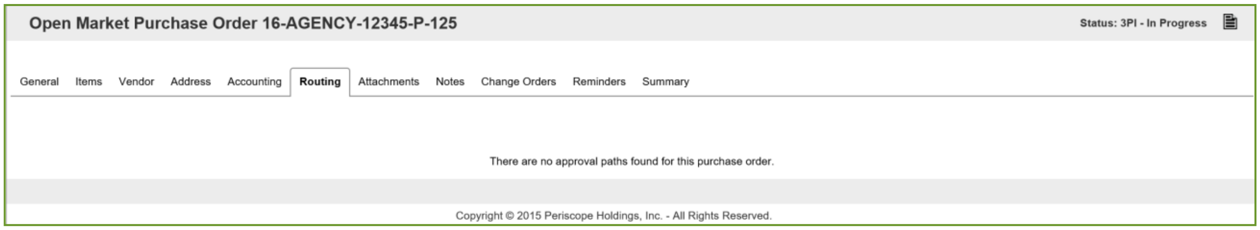
Purchase Order Accounting Field Descriptions

Field Name	Description
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those

	fields, reference the Custom Column Quick Reference Guide.

Routing Tab

The routing that a Purchase Order must follow for approval is determined by the applicable approval paths. The approval path for the Purchase Order is displayed on the Routing Tab. This tab remains blank until an approval path is determined when the Purchase Order is submitted for approval.



Any Approval routings for this PO will display in this screen when the PO moves to Ready for Approval Status.

Control Tab (Master Blanket only - Not used for Small Purchase)

BidBuy allows single or multiple departments to create releases against a master blanket. The control tab contains the contract beginning and end dates, department information and dollar limits. Once a department has been added and saved, another line will appear to facilitate adding another department control if needed.

NOTE: To allow all organizations to order from the blanket, select the AGY – Agency Umbrella Master Control as the Department. Also, user can you add just specific organizations that include all their departments, unless the user specifies certain departments.

A red Master Control Validation Error will show until you have successfully entered the blanket's control data.

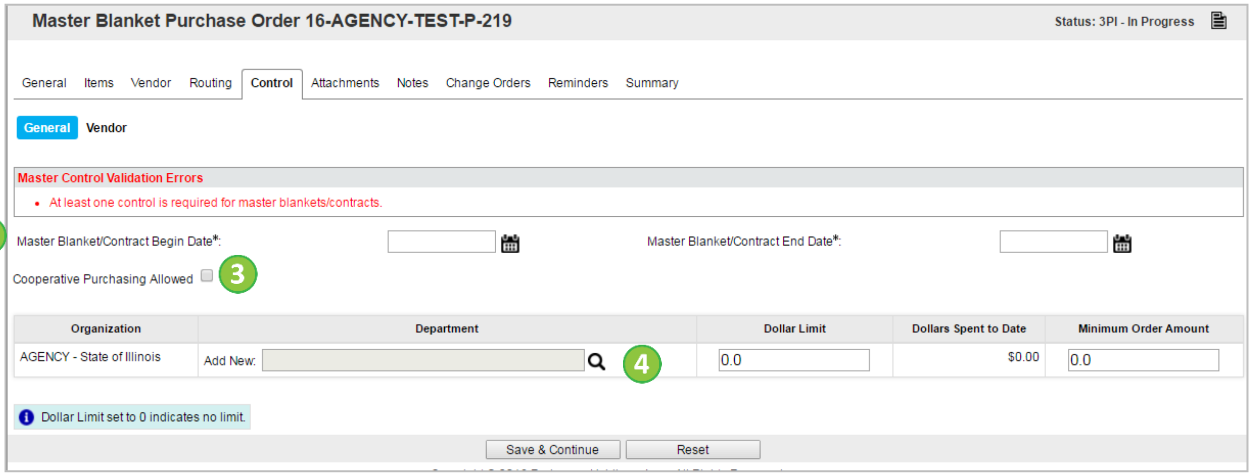
Control Tab: General

1. Select **General** tab under **Control** tab

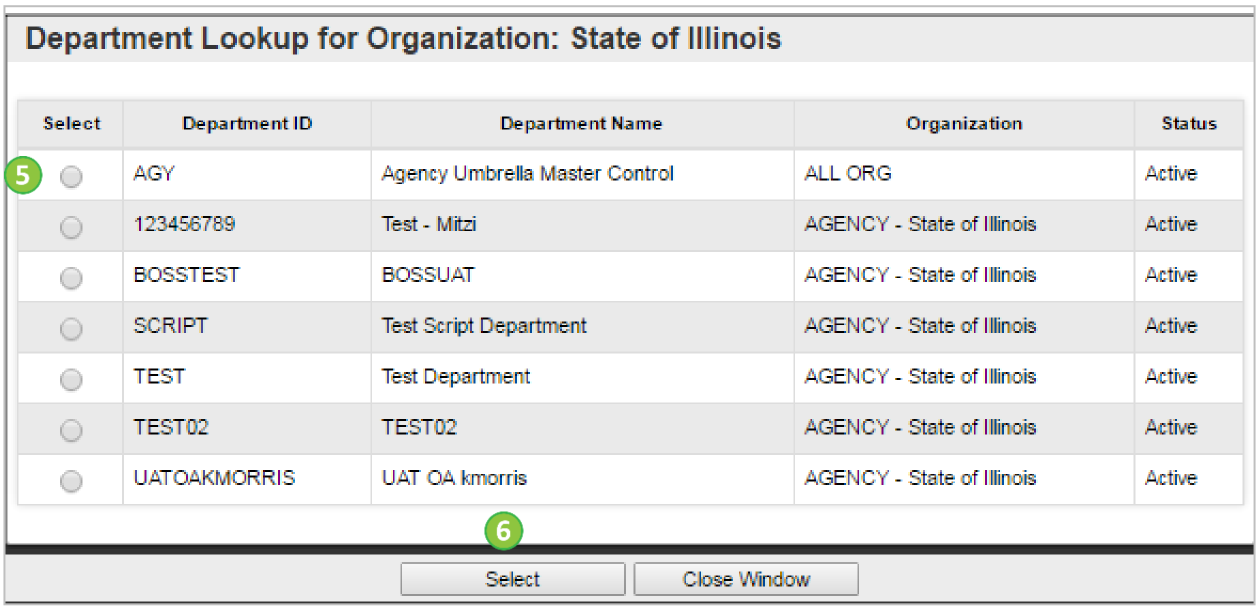
See Purchase Order Control Field Description Table. All fields with an Asterisk* are required.

2. Enter **Begin** and **End Dates**
3. Select **Cooperative Purchasing Allowed** if other organizations can order from it as well as user's department

4. Select to Add New Department



5. Select **Department**
6. Click **Select**

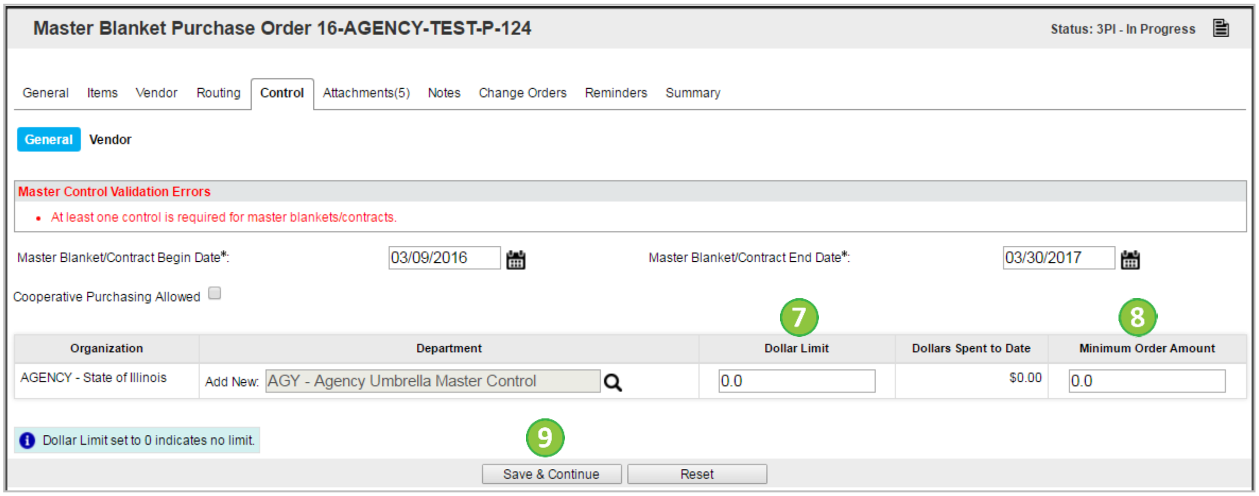


Department Lookup for Organization: State of Illinois

Select	Department ID	Department Name	Organization	Status
	AGY	Agency Umbrella Master Control	ALL ORG	Active
	123456789	Test - Mitzi	AGENCY - State of Illinois	Active
	BOSSTEST	BOSSUAT	AGENCY - State of Illinois	Active
	SCRIPT	Test Script Department	AGENCY - State of Illinois	Active
	TEST	Test Department	AGENCY - State of Illinois	Active
	TEST02	TEST02	AGENCY - State of Illinois	Active
	UATOAKMORRIS	UAT OA kmorris	AGENCY - State of Illinois	Active

Select Close Window

7. Enter **Dollar Limit**
8. Enter **Minimum Order Amount**
9. Click **Save & Continue**

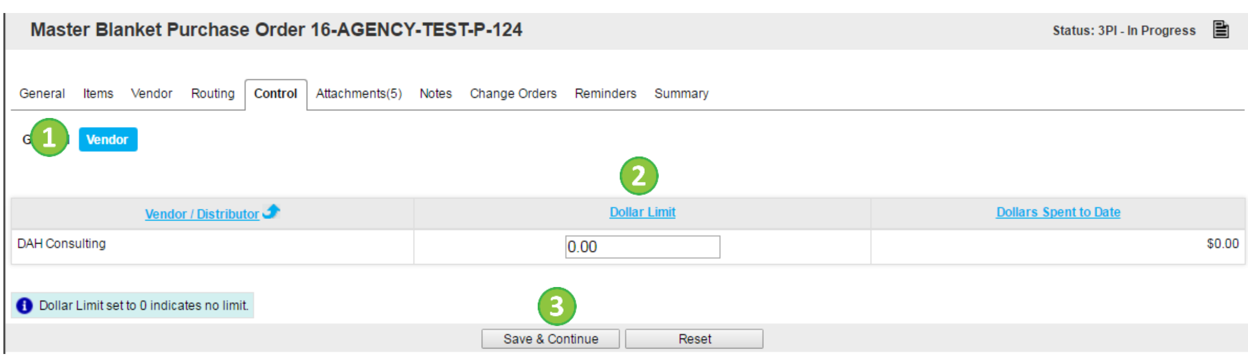


Purchase Order Control Field Descriptions

Field Name	Description
Master Blanket/Contract Begin Date*:	Beginning date of contract/blanket
Master Blanket/Contract End Date*:	Ending date of contract/blanket. After this date, no one can order from the Blanket unless a change order is applied.
The Cooperative Purchasing Allowed checkbox	Control if the master blanket is for just the user’s organization or if other organizations can order from it as well.
Organization/Department	To allow all organizations to order from the blanket, select the AGY – Agency Umbrella Master Control as the Department. Also, user can you add just specific organizations that include all their departments, unless the user specifies certain departments.
Dollar Limit	Dollar limit for this contract/blanket. Dollar Limit set to 0 indicates no limit.
Minimum Order Amount	Minimum order for each release against this contract/blanket.

Control Tab: Vendor

1. To limit dollar amount per vendor, select **Vendor** tab under **Control** tab
2. Enter **Dollar Limit**



3. Click **Save & Continue** to save limits

Attachments Tab

Both files and forms (when Form Builder is enabled) can be attached by the agency (BP user) or by the vendor (Seller user) on the purchase order.

Attaching files to BidBuy documents is a useful way to include specifications or other guidelines in procurement documents. The user can attach multiple files such as documents, spreadsheets, memoranda, etc. and can use the **Attachment** Tab to upload the files.

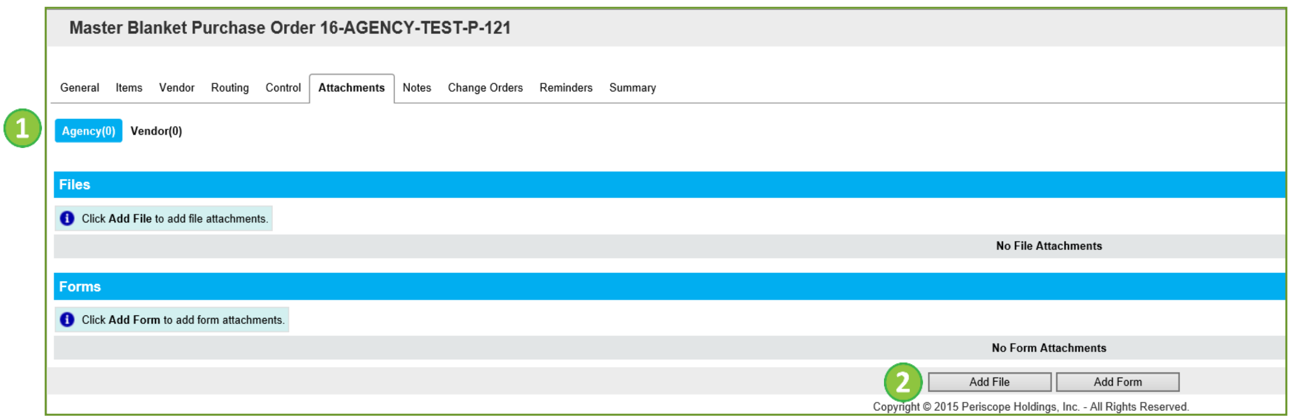
The Add Form button allows the agency to attached predefined published forms. Only those forms that are published for the organization (agency) with the specific document type and specific user role can be attached to the specific document.

For form and file information from CMS and the CPO-GS, see the Attachment Appendix.

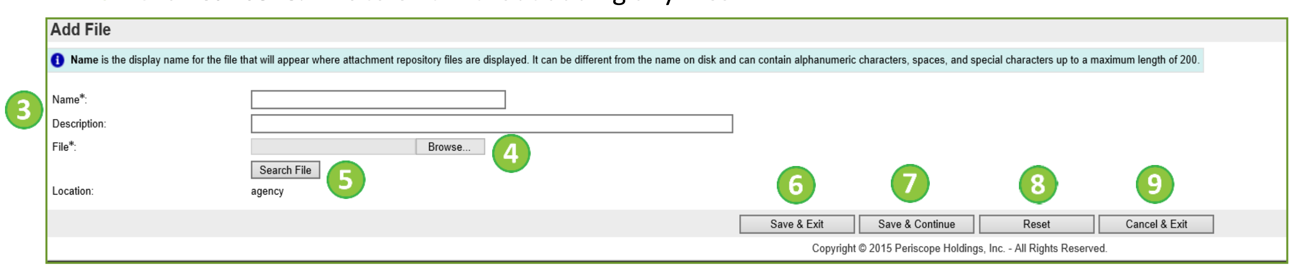
Attachments Tab: Agency

Add Agency Files to PO

1. Select **Agency** tab
2. Click **Add File** to add a file.



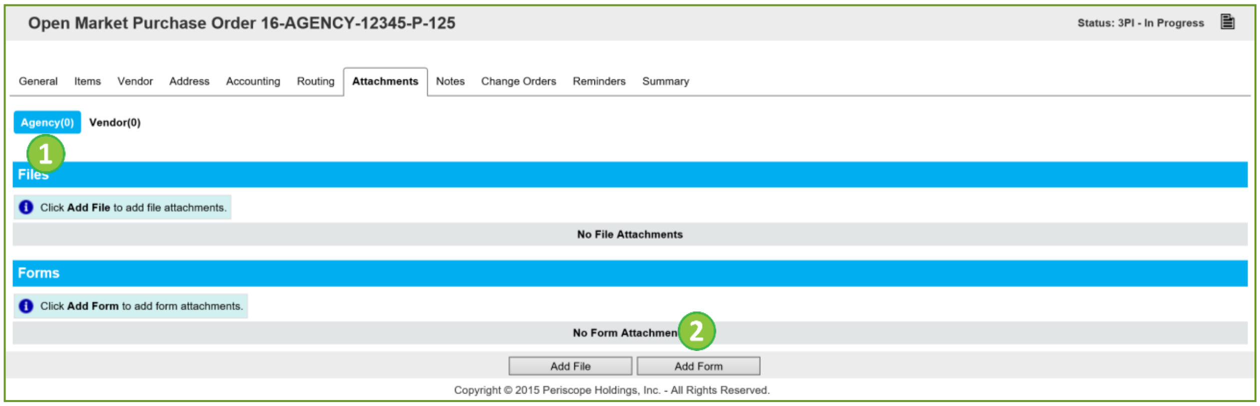
3. Add file **Name** and **Description**
4. Click **Browse** to browse the computer for a file
5. Click **Search File** to search for a file in the repository
6. Click **Save & Exit** when done with loading the file
7. Click **Save & Continue** to save changes made and remain on the same screen
8. Click **Reset** – to reset display and start from scratch
9. Click **Cancel & Exit** to exit without adding any files



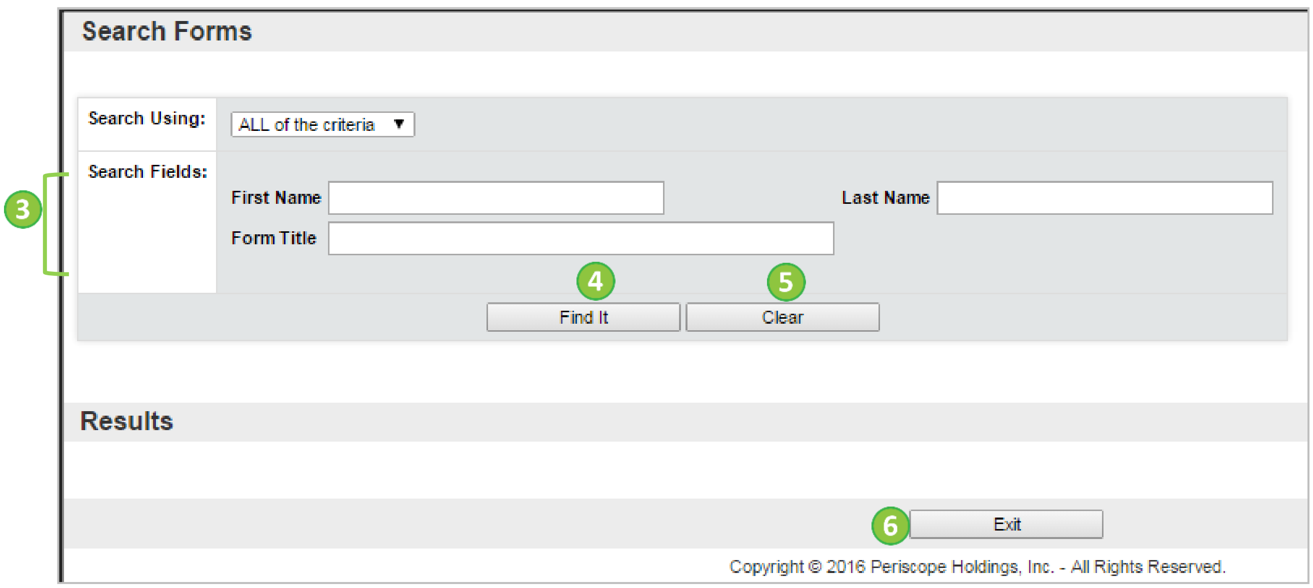
Add Agency Forms to PO

1. Select **Agency** tab

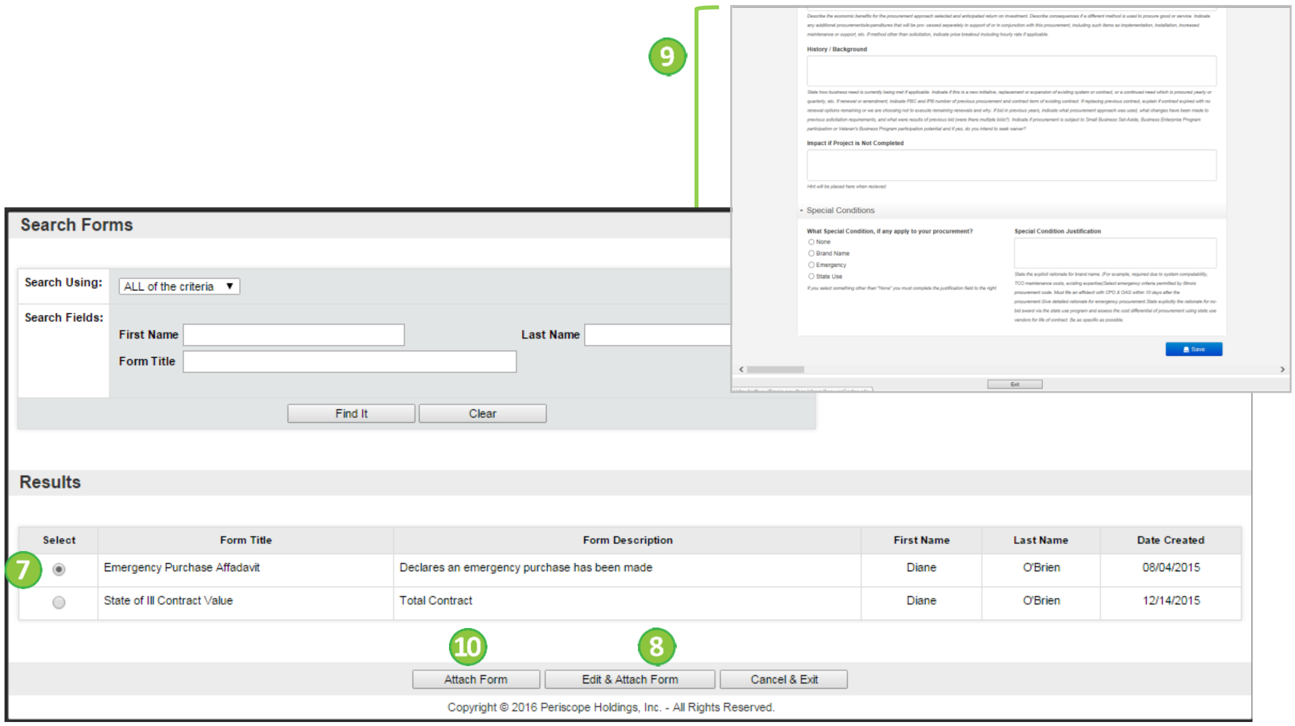
2. Click **Add Form**



3. Enter **search** criteria
4. Click **Find it** to find form
5. Click **Clear** to restart search
6. Click **Exit** to exit



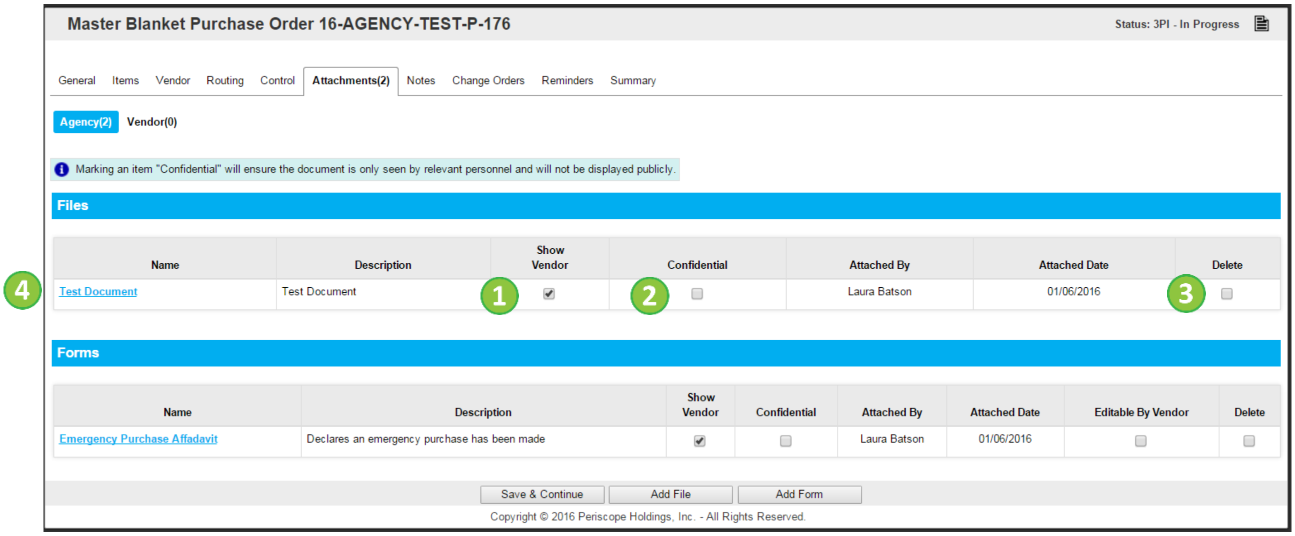
7. Select radio button for Form Title
8. Click **Edit & Attach Form** to edit form and attach to PO
9. Enter **form i**nformation, then click Save and Exit buttons
10. Click **Attach Form** to PO without editing



Update Files

Attachments can be added and deleted. To update a specific attachment, you need to update the file outside BidBuy, then delete the old one and add the new one.

1. Select **Show Vendor** to show to all vendors
2. Select **Confidential** to display only to the seller and certain BP and DA roles within the organization and will not be displayed publicly
3. Select **Delete** to delete attachment



4. Click **Name** to update Description or download attachment

5. Update **Description**
6. Download file, click

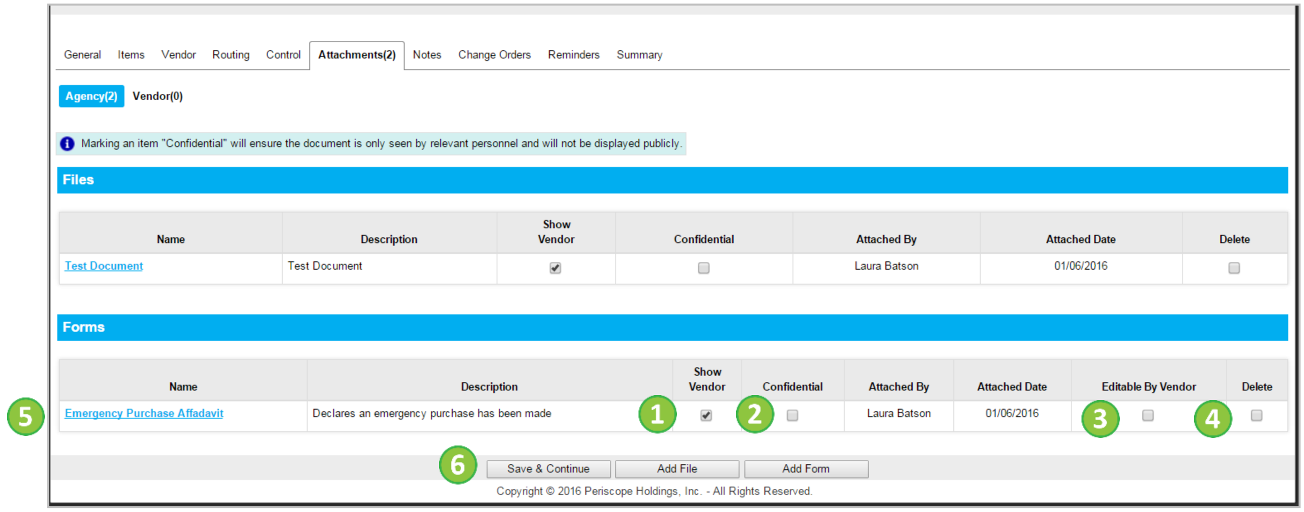
Other information must be updated by deleting and adding a new file.

7. Click **Save & Exit**

Update Forms

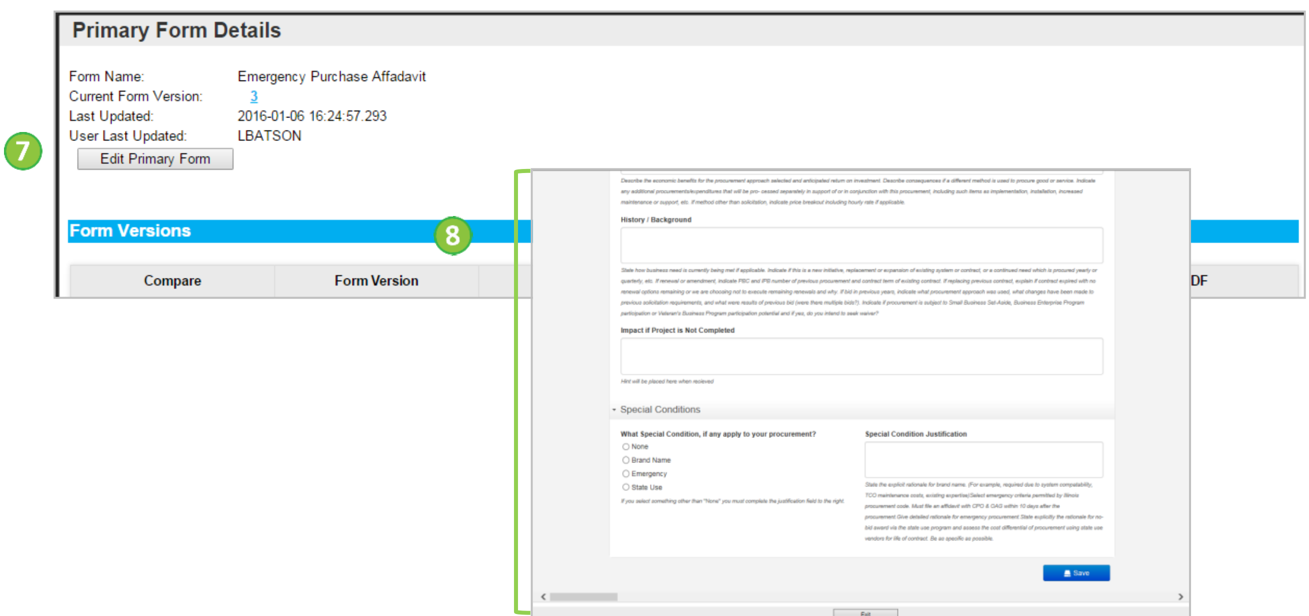
Forms can have multiple versions. If anything is added to a form, it then becomes the primary form.

1. Select **Show Vendor** to show to all vendors
2. Select **Confidential** to display only to the seller and the agency user (confidential files are not displayed publicly)
3. Select **Delete** to delete form
4. Select **Editable By Vendor** to allow vendors to update the form
5. Click **Name** to view and modify form



6. Click **Save & Continue**

7. Click **Edit Primary Form** to update form

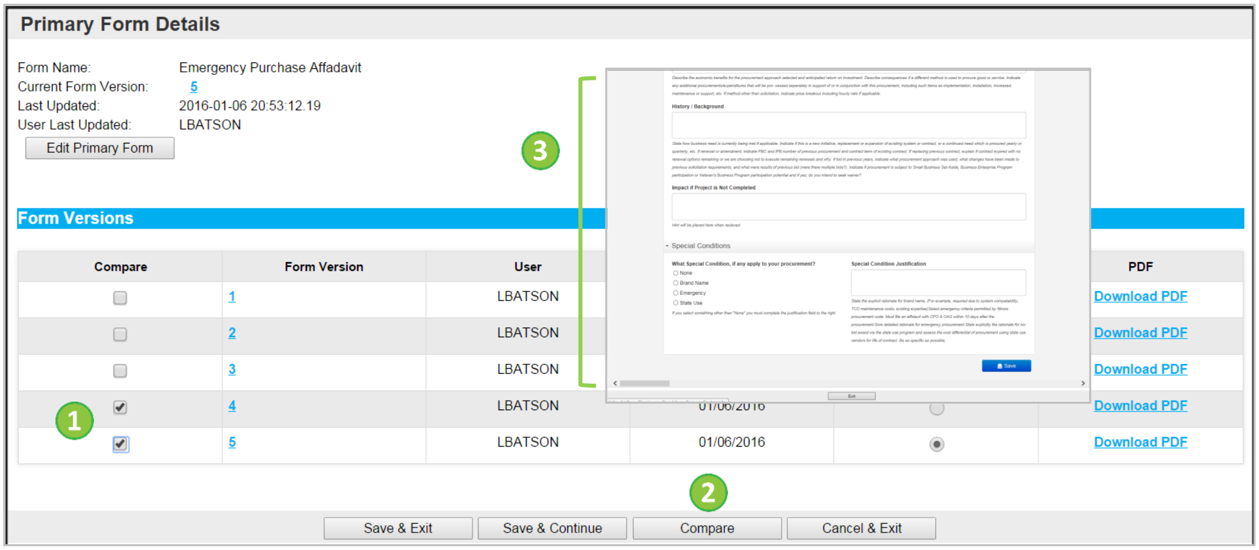


8. Update form information, then click **Save and Exit**

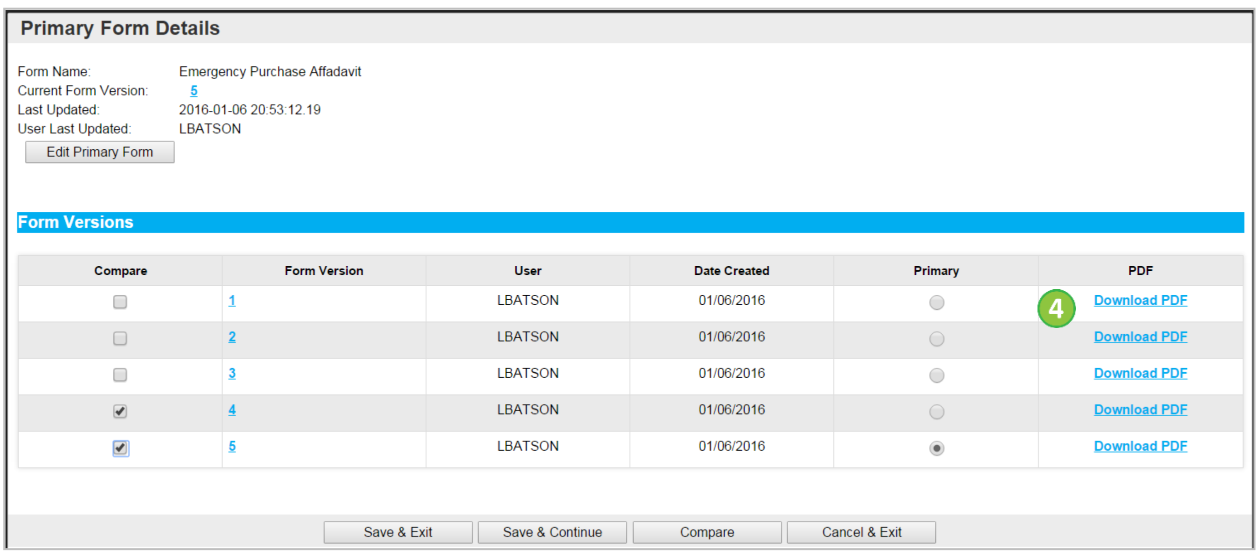
The updated form defaults as the Primary form.

Compare Form Versions

1. Select **Compare** on the Forms to compare
2. Click **Compare**
3. Review the two Forms for changes and click **Exit** when finished



4. To view form as PDF, click **Download PDF**

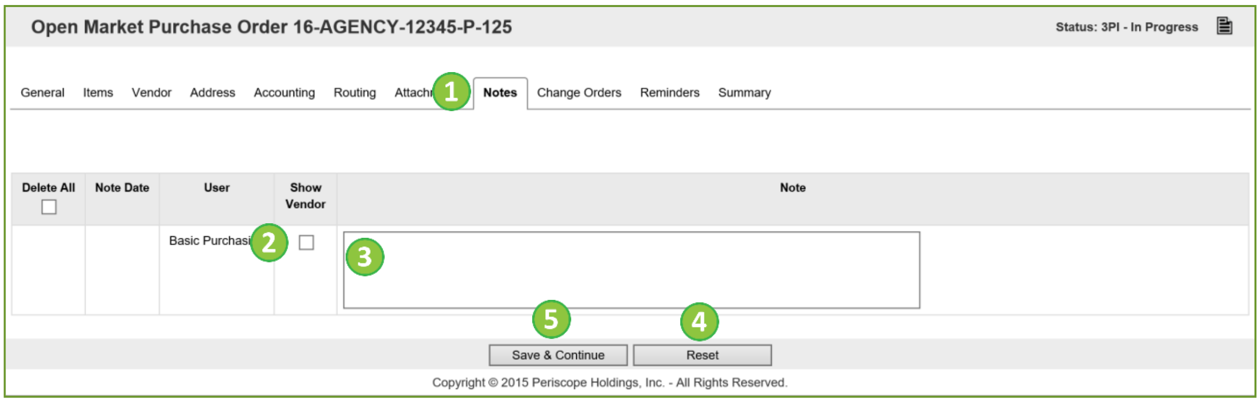


Form appears in PDF default viewer to save, print, etc.

Notes Tab

The **Notes** tab allows the user to add, edit and delete notes to provide additional information or special instructions for internal users. Only the user may edit their note. These notes are associated with all items on the Purchase Order. To add notes to specific items, go to the Items tab. A note is similar to a post-it note as an internal communication.

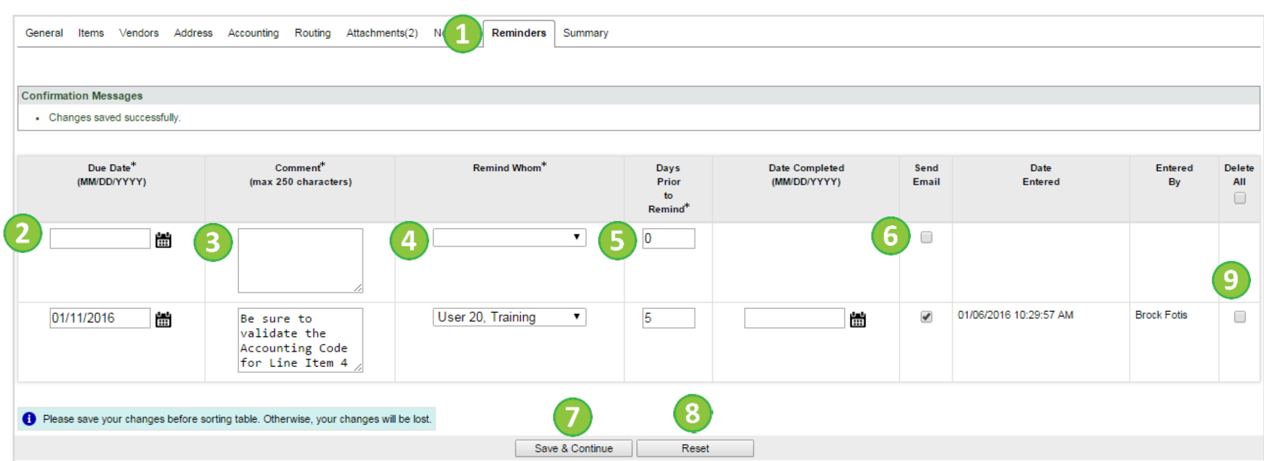
1. Select **Notes** tab
2. Click **Show Vendor** to display those notes on vendor purchase order (on PO only)
3. Enter note text
4. Click **Reset** to clear form
5. Click **Save & Continue** to save notes



Reminders Tab

Reminders are a useful function of the application to send to a specific user of BidBuy on a specific date.

1. Select **Reminders** tab
2. Enter the **Due Date** for the Reminder
3. Enter the Reminder **Comments**
4. Select **Remind Whom** from drop-down list
5. Enter **Days Prior to Remind**
6. Select **Send Email** for email reminder
7. Click **Save & Continue** to save reminder
8. Click **Reset** to empty all fields not yet saved
9. To delete a reminder, select the **Delete** and click **Save & Continue**



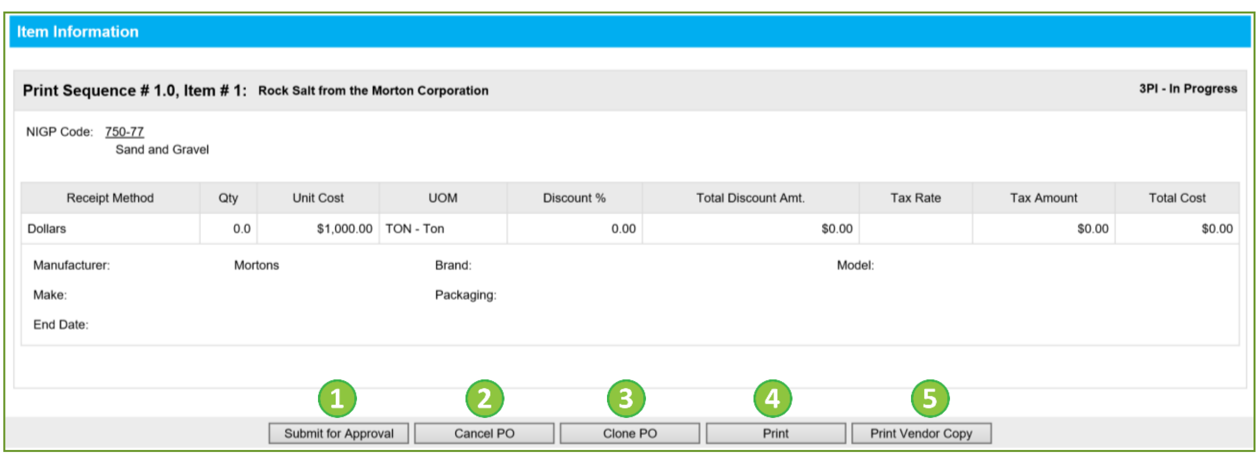
Purchase Order Reminder Field Descriptions

Field Name	Description
Due Date* (MM/DD/YYYY	Using the calendar lookup icon, select the date the reminder is due.
Comment*	Enter up to 250 characters of comment text.
Remind Whom*	Using the dropdown menu, select the person to remind.
Days Prior to Remind*	Enter the number of days prior to the due date, the person should be reminded. The user can enter up to 9999.
Send Email	To send out an email reminder, place a check in the checkbox.
Date Entered	Displays the date and time the reminder was created.
Entered By	Displays the name of the person who created or edited the reminder.
Delete	When checked and the Save & Continue button is selected, the reminder is deleted from the vendor performance document.
Date Completed	The Date the user from the Remind Whom, has marked the reminder as being accomplished.

Submit Purchase Order for Approval

The Summary Tab will feature all the data entered and selection choices by the user in the previous tabs. This gives the user an opportunity to review all applicable information and return to any given tab to edit errors or update with new information. Red validation errors do not allow you to process the Purchase Order until reconciliation. Yellow Errors are warnings, but allow you to process the Purchase Order.

1. At the bottom of Summary tab, click **Submit (PO) for Approval** to initiate approvals for the purchase order
2. Click **Cancel PO** to prevent any further action on the PO
3. Click **Clone PO** to create a copy of the PO as a new PO in progress
4. Click **Print** to print PO
5. Click **Print Vendor Copy** to print a copy for the seller

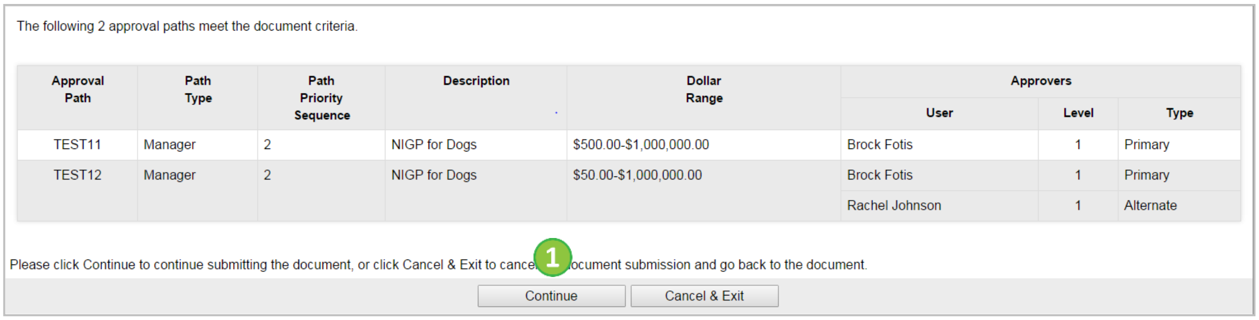


Submit for Approval

When an approval path is configured for the Purchase Order, the approvers will attach to the Purchase Order and it will move to Ready for Approval status.

If there is an approval path associated with this document, the user will see the approvers and the status on the summary page.

2. Click **Continue** to send approver email to approve



The following 2 approval paths meet the document criteria.

Approval Path	Path Type	Path Priority Sequence	Description	Dollar Range	Approvers		
					User	Level	Type
TEST11	Manager	2	NIGP for Dogs	$500.00-$1,000,000.00	Brock Fotis	1	Primary
TEST12	Manager	2	NIGP for Dogs	$50.00-$1,000,000.00	Brock Fotis	1	Primary
					Rachel Johnson	1	Alternate

Please click Continue to continue submitting the document, or click Cancel & Exit to cancel document submission and go back to the document.

Continue | Cancel & Exit

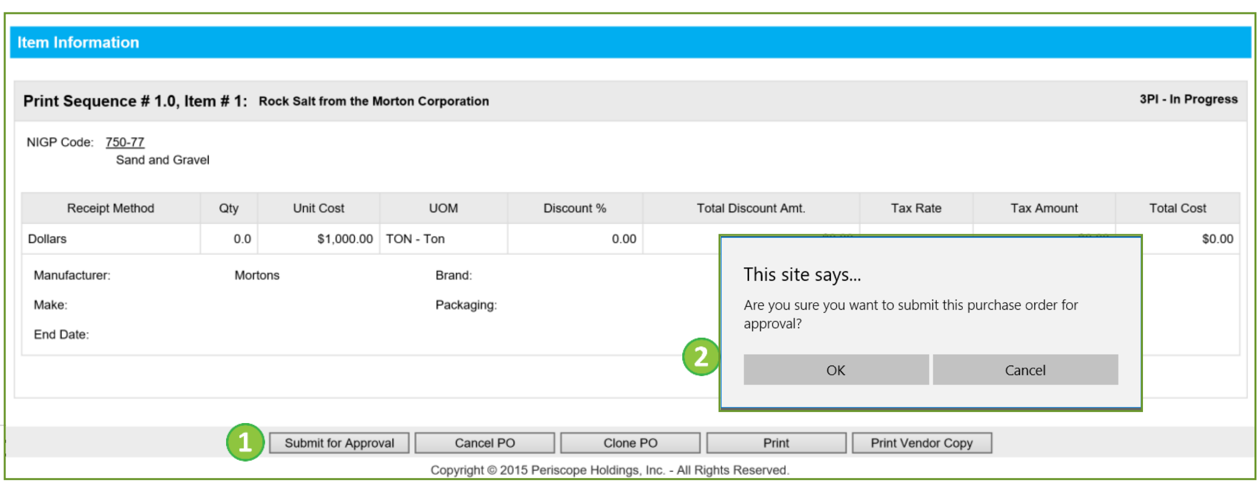
The sequence number is the order in which the approver can approve the document.

When there is no approval path assigned, the user is prompted to select:

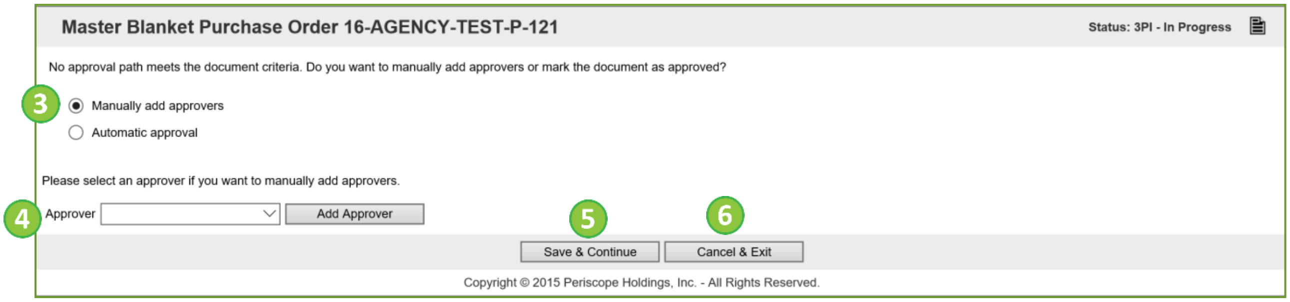
- **Automatic Approval** – Selecting this will move a document to Ready to Send status. This option is visible when there are no configured approval paths on the document.
- **Manually Add Approvers** – Requires the user to choose from a drop down list with individuals designated as approvers. The user selects an individual, clicks add approver and then saves the approval (see example below).

Printing the Vendor copy of a PO does not include accounting information.

1. Click **Submit for Approval**
2. Click **OK**



3. Select **Manually add approvers** to add additional approvers
4. Select **Approvers** from drop-down list and click **Add Approver**
5. Click **Cancel & Exit** to exit
6. **Save & Continue** to continue

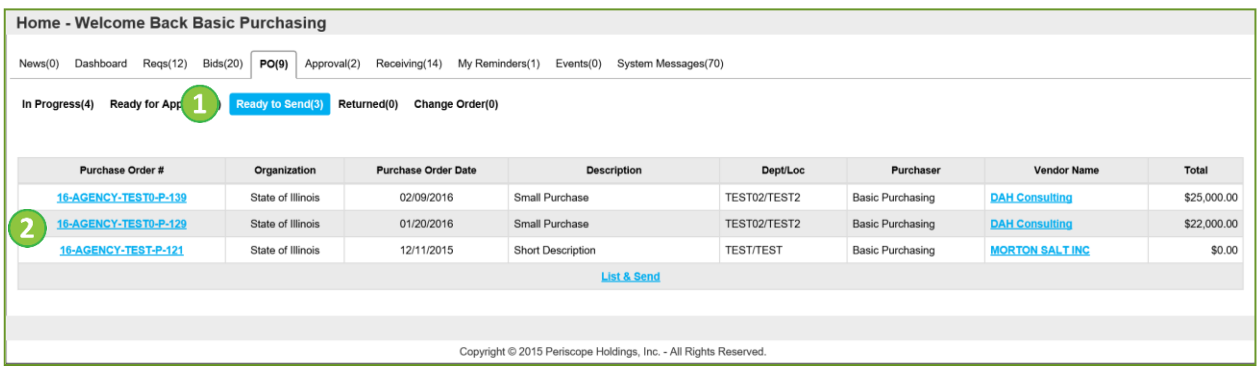


Send Purchase Order

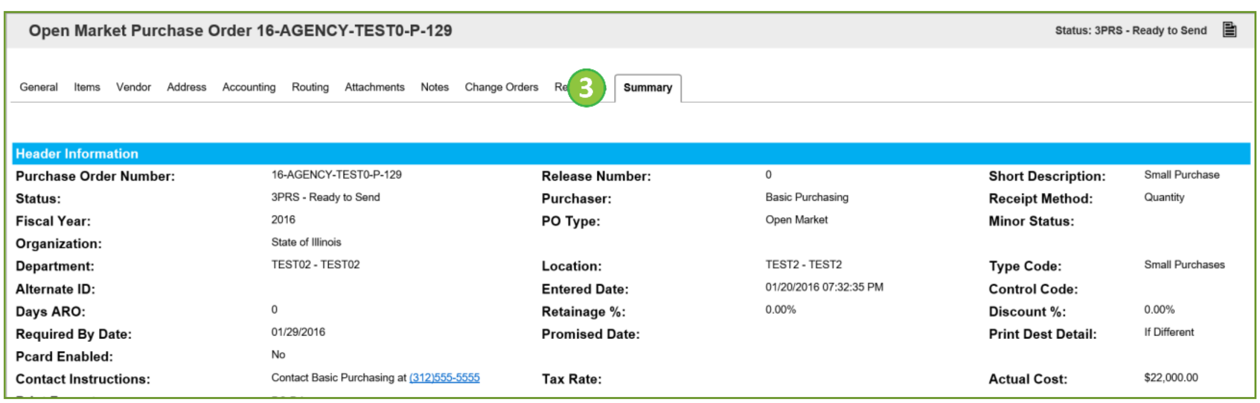
Once purchase order is fully approved, the BP user must send it to the Vendor. Note that a Change Order may be created to add additional documentation or modifications to the PO after approval and before it is sent to the vendor.

Select PO to Send

1. Navigate **BP login** > **Home** > **PO** > **Ready to Send**
2. Click hyperlink for PO to send

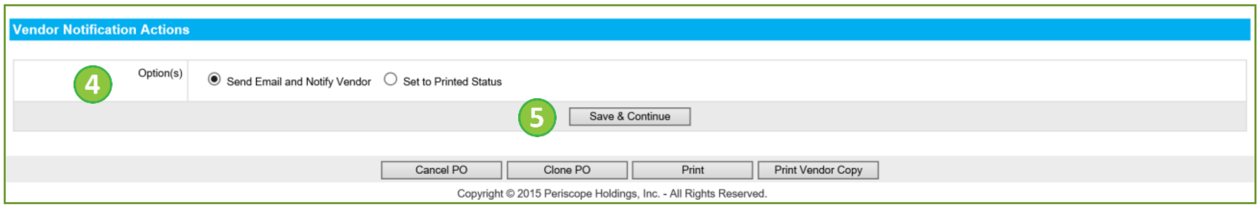


3. Navigate to PO **Summary** for PO to send



4. At the bottom of **Summary** select radio button to **Send Email and Notify Vendor** or **Set to Printed Status**
5. Click **Save & Continue** to send PO

Status for PO is Ready to Send on top right of the document


Vendor Notification Actions
4
Option(s)
Send Email and Notify Vendor
Set to Printed Status
5
Save & Continue
Cancel PO
Clone PO
Print
Print Vendor Copy
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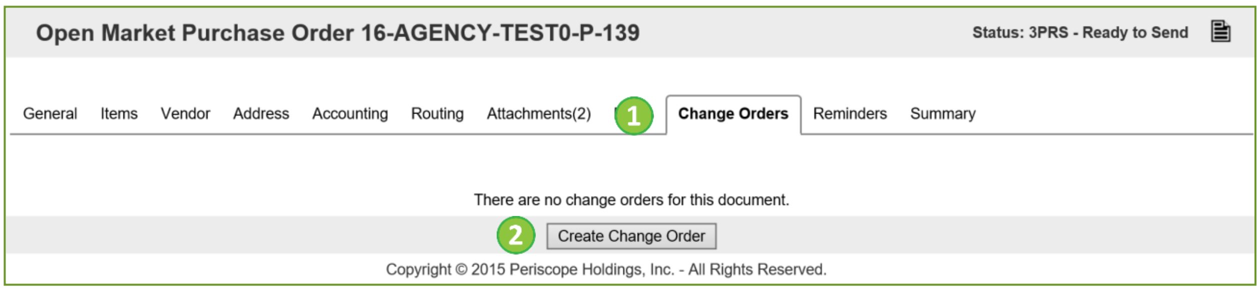
Change Order to Attach Executed Contract

Change Orders Tab

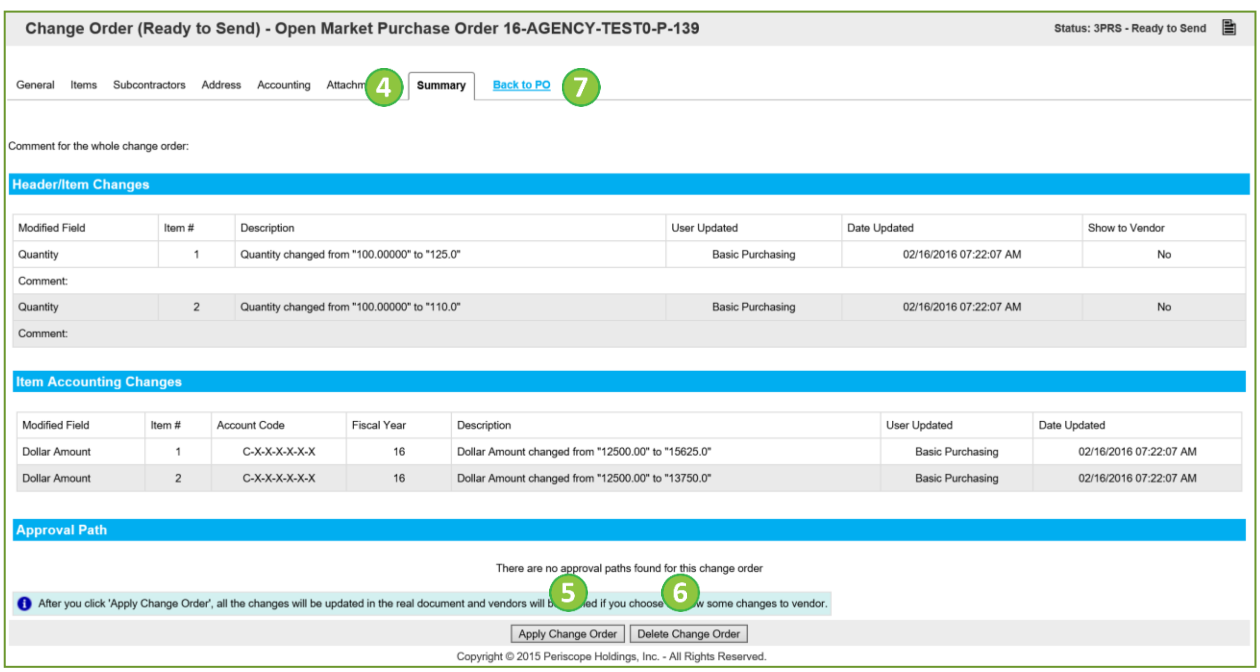
Change orders can only be applied after a purchase order has moved to Ready to Send or Sent status. The Change Order tab is used when the PO has been approved and changes need to be made.

> **The purchase order has to be approved and in Ready to Send or Sent status to initiate a change order.**

1. Select **Change Orders** tab
2. Click **Create Change Order**

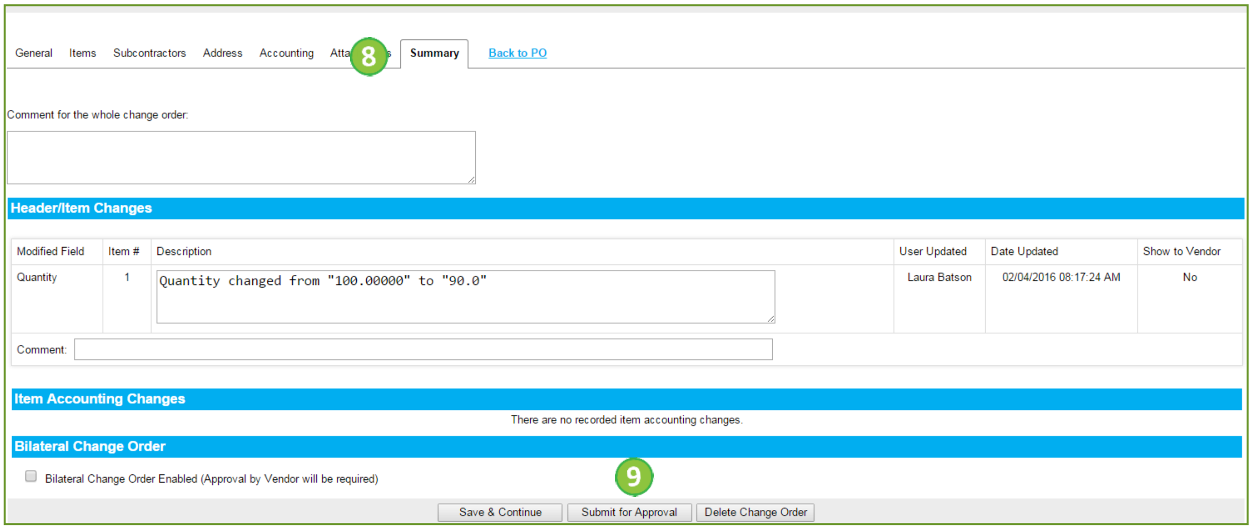


3. Update various tabs (General, Items, Attachments, etc.)
4. The **Summary Tab** displays the summary of the change order.
5. To apply change order, click **Apply Change Order**
6. To delete change order, click **Delete Change Order**
7. Click **Back to PO** hyperlink to return to the original PO



8. Once all changes are made, select **Summary** tab

9. Click **Submit for Approval**



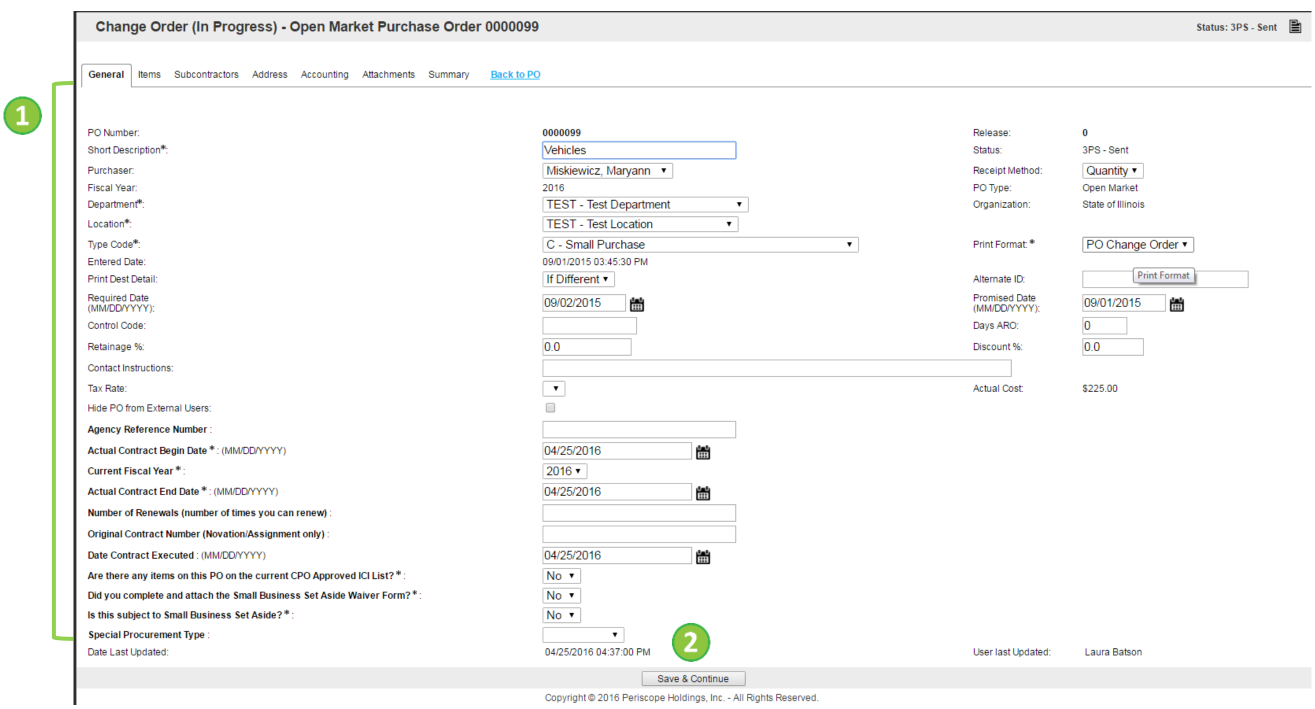
Update Change Order Tabs

General Tab

1. Update General information for the CO

> **See Purchase Order General Field Descriptions Table. All fields with an Asterisk* are required.**

2. Click **Save & Continue**



Purchase Order General Field Description

Field Name	Description

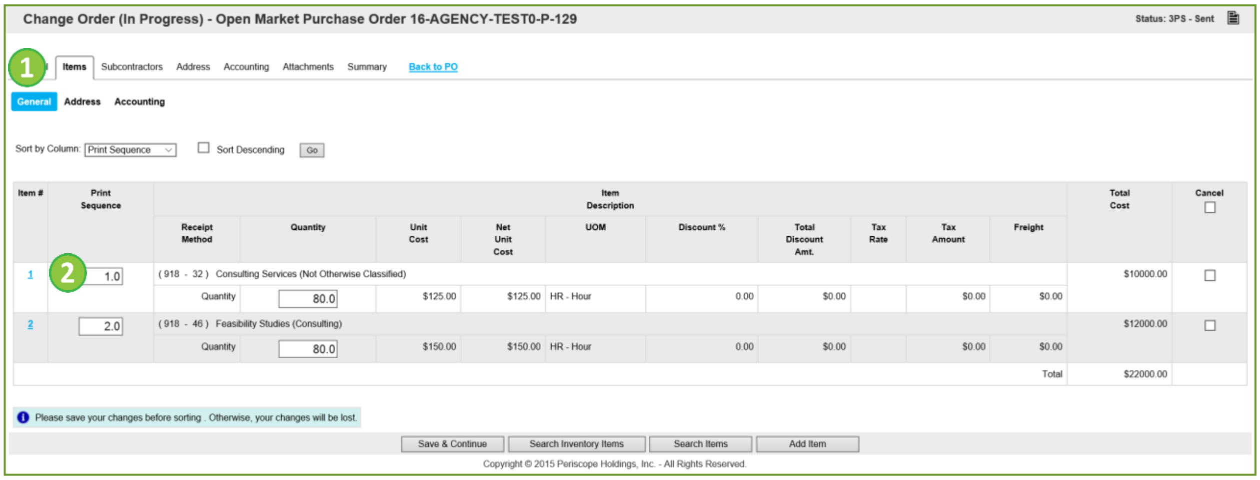
Field Name	Description
PO Number	System generated number
Short Description	Short Description helps the user identify or locate the document. Use complete words, not abbreviations. Start with alpha agency identifier, and then describe the item to be procured. Noun, Adjectives.
Department	The department that is managing the contract.
Location	The location within the department managing the contract.
Type Code	These are defined by your agency
PCard	Not used by the State
Print Format*	Use Default – PO Print
Entered Date	This will populate when the document is saved.
Print Dest	Detail Choose if addresses for items going to different destinations print out on the PO: if different, never select, always. Use default.
Alternate ID	Agency defined alternate ID field. The length of this field is determined by system settings. The field length can be from 0 to 50 characters. CAUTION: the alternate id field may be used by interface processing. Beware deleting or changing data within the alternate ID field as it may cause invalid data or errors during the interface processes. **Not to be updated by the user.**
Required Date	The date and time by which the originator requested that delivery of the items on this purchase order be delivered. **This is typically defined at the contract, so no input is necessary.**
Promised Date	The date by which the vendor must deliver the goods. **This is typically defined at the contract, so no input is necessary.**
Control Code	Agency defined control code.
Days ARO	The number of days after receiving this order by which the vendor should deliver the goods.
Retainage %	Not used by State.
Discount %	Percentage of discount to be applied to PO.
Contact Instructions	Defines contact for the document.
Tax Rate	Not used by State
Actual Cost	The total cost of all the items on this purchase order, including any applicable tax, freight, or discounts.
Invoice Method	Not used by State
Receipt Method	Not used by State
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

Items Tab

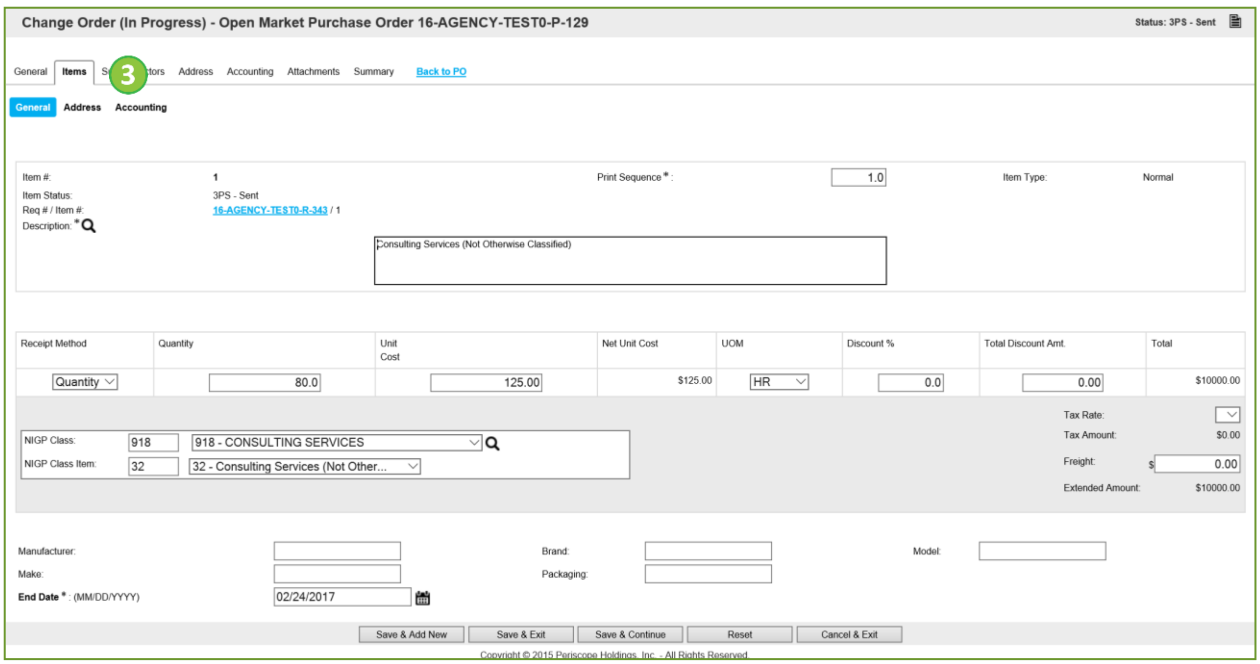
Items Tab: General

1. Select **Items** tab to review items in CO

2. Click **Item #** to update item information



3. Update information on Item Details Screen
4. Click **Save & Exit**



Purchase Order Item Field Descriptions

Field Name	Description
Item #	The order in which items are entered and are sequentially listed by BidBuy. This field cannot be modified by the user.
Print Sequence*	The order in which the items will be displayed. The item # is the default value for this field. The user can change this field if the print sequence needs to be different from the item number sequence.
Item Type	The user can select *Normal* or *Narrative* as the type. Selecting *Narrative* will make it a non-item addition where the user can type in text to appear on the purchase order.
Item Status	The status of the item on the Requisition.
Description*	The description of the item as defined by the user. Use complete words, not

Field Name	Description
	abbreviations, NIGP description, where applicable, broad description, then detail (e.g. Lettuce, spring mix; service example: Maintenance, Repair, HVAC.) NOTE: This is a searchable field for blanket contracts using Quick Buy. Use a searchable description and include any keywords that might assist future buyers.
Quantity	The Quantity of the item being requested. The user can type the amount of the item that is needed. The default value is zero.
Unit Cost	An estimated unit cost per item.
Net Unit Cost	Net unit cost per item is the Unit Cost – Discount % amount for unit cost.
UOM	User selects a unit of measure from the drop-down menu**. Reference Appendix A: Unit of Measure Descriptions, page 80.**
Discount %	Used if there is a percentage discount applicable to the item.
Total Discount Amt.	The Total Discount Amount, based on the Discount %. This value is calculated automatically by the system based on the Discount % value entered by the user. The value will not appear until the user tabs out of the Discount % field. The user can also manually type in a discount amount without entering a Discount %. The value must be negative for it to be deducted from the total.
Total	The Total Cost before tax. This value is calculated automatically. The formula used is: (Quantity x Unit Cost) – Total Discount Amount. The user cannot edit this field.
NIGP Class*	The three-digit Class Code associated with the item. Class Codes are listed on the pulldown menu in alphabetical order or through the search feature.
NIGP Class Item*	The two-digit Class Item associated with the item. Class items are listed on the pulldown menu in alphabetical order or through the search feature.
Commodity Code	Completes the full 11-digit NIGP code
Tax Rate	The State is not using Tax Rate.
Tax Amount	The State is not using Tax Amount.
Freight	The amount of Freight applied to this item.
Extended Amount	The Total Extended Amount of the item. This value is calculated automatically. The formula used is: Total + Tax Amount + Freight. The user cannot edit this field.
Manufacturer	Optional field.
Brand	Optional field.
Model	Optional field.
Make	Optional field.
Packaging	Optional field.
Receipt Method	Not used by State
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

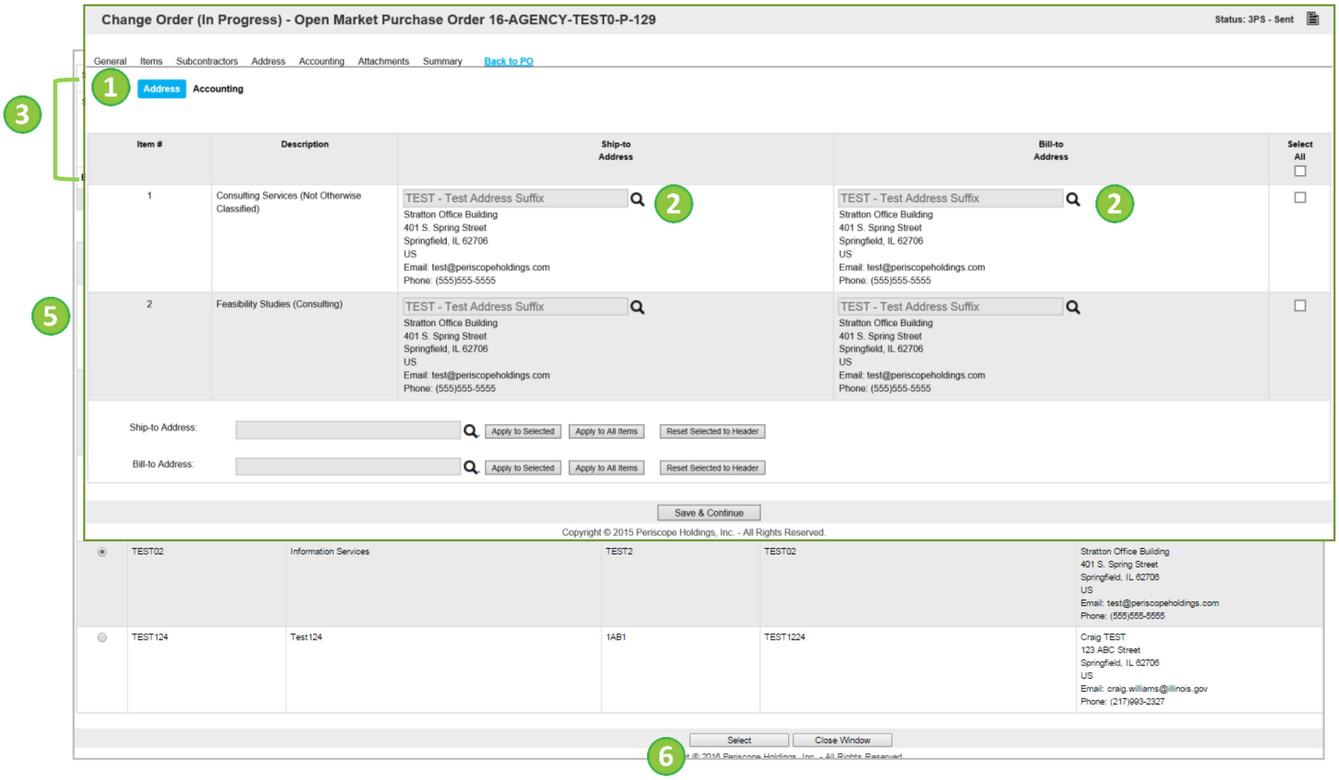
Items Tab: Address

This allows shipping and billing addresses for specific items. To assign shipping and billing addresses for all items go to the main Address tab for the purchase order.

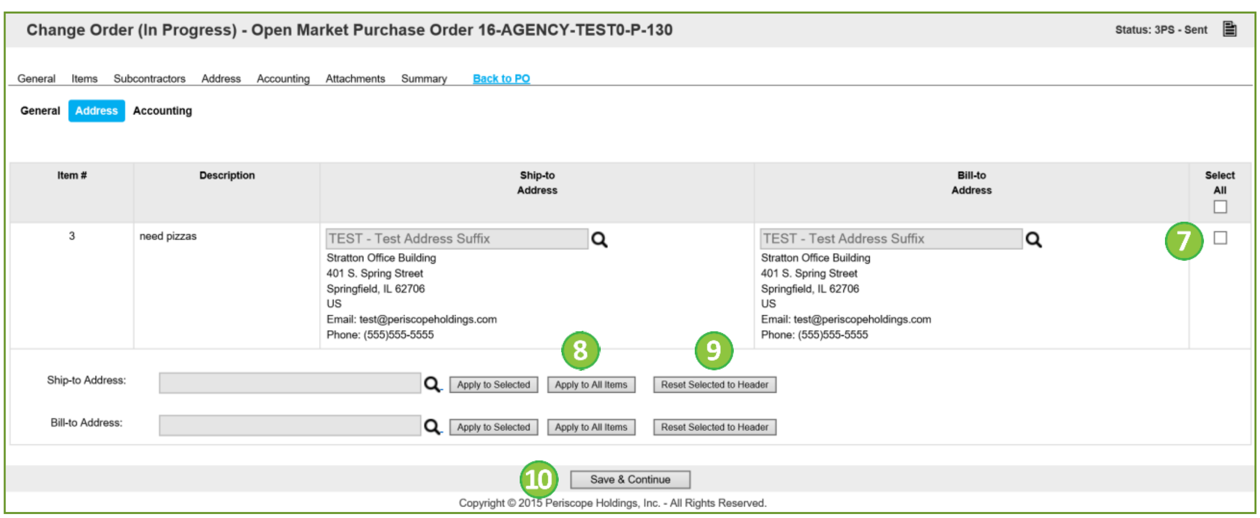
1. Select **Address** sub-tab

Default address information from the item master displays.

2. To change **Ship-to** or **Bill-to-Address**, click to search for new address
3. Enter Search Criteria
4. Click **Find It**
5. Select a new address



6. Click **Select** to update address
7. Select item(s) to change address (Ship/Bill to Address)
8. Click **Apply to Selected** to apply changes to only selected items or click **Apply to All Items** to apply changes to all items
9. Click **Reset Selected to Header** to reset all addresses to default from **Item Master**
10. **Save & Continue** to save changes and continue



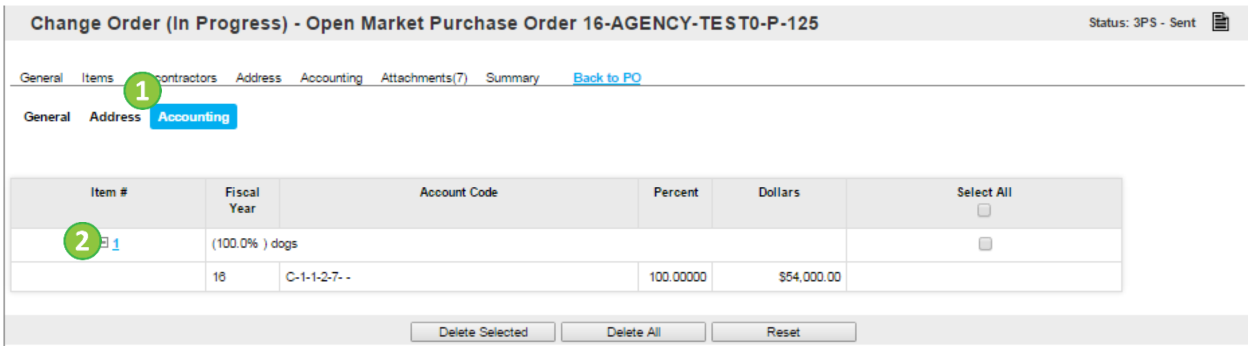
Items Tab: Accounting

The Item's Accounting sub-tab allows the user to enter accounting information to specific items. To add the same accounting information to all items, go to the main Accounting tab for the purchase order.

1. Select **Accounting** sub-tab

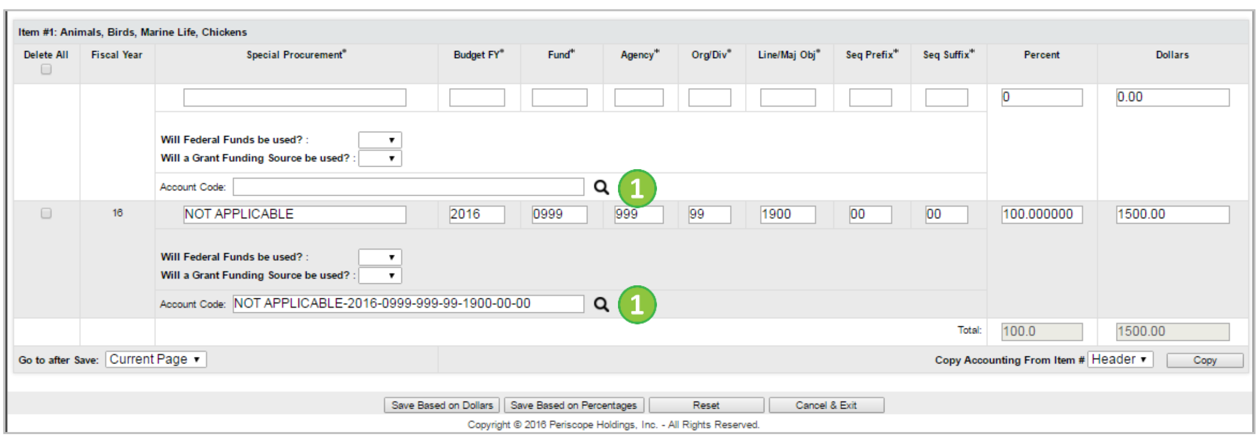
Default accounting information from the item master displays.

2. Select Item # to update accounting information

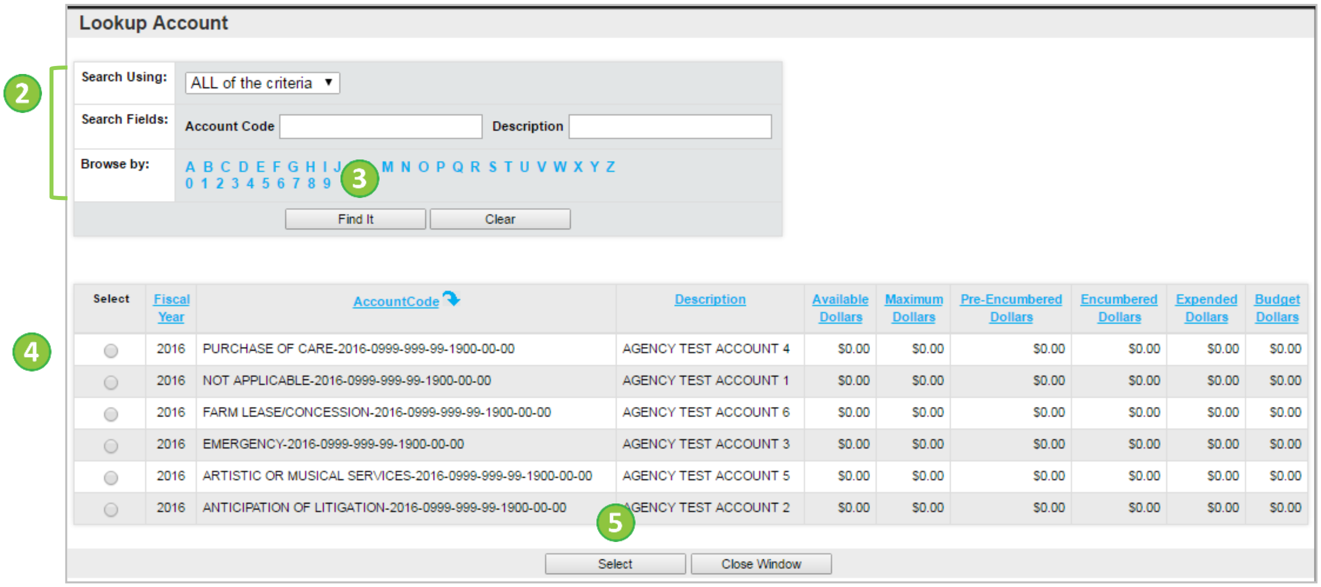


Add or change Account Code

1. Click 🔍 to search for **Account Code**



2. Enter search criteria
3. Click **Find It**
4. Select **Account Code**
5. Click Select



6. Click **Save Based on Dollars –** to save based on dollar amount entered, or
7. Click **Save Based on Percentages –** to apply changes and save based on percentages entered
8. Click **Cancel & Exit** to exit without saving

Attachments Tab

Both files and forms (when Form Builder is enabled) can be attached by the agency (BP user) or by the vendor (Seller user) on the purchase order. The user may also change those attachments when creating a change order.

Attaching files to BidBuy documents is a useful way to include specifications or other guidelines in procurement documents. The user can attach multiple files such as documents, spreadsheets, memoranda, etc. and can use the **Attachment** Tab to upload the files.

The Add Form button allows the agency to attached predefined published forms. Only those forms that are published for the organization (agency) with the specific document type and specific user role can be attached to the specific document. **(See page 56 for details).**

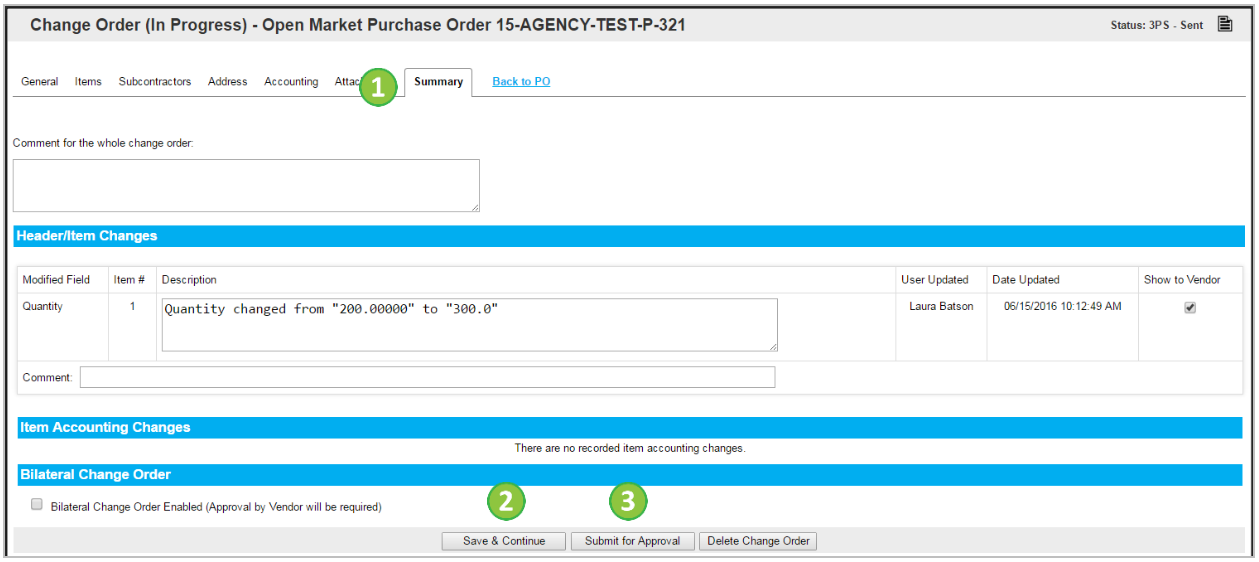
Submit CO for Approval & Apply the CO

Summary Tab

Once changes are made to the change order, they will be listed on the summary page. All the changes are listed for review.

Upon completion of creating a change order the user submits the Change Order for approval by scrolling down to the bottom of the **Change Order Summary** tab.

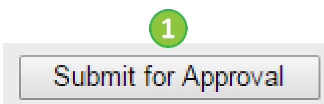
1. Select **Change Order Summary** tab
2. Scroll-down to the bottom and click **Save & Continue**
3. Click **Submit for Approval**



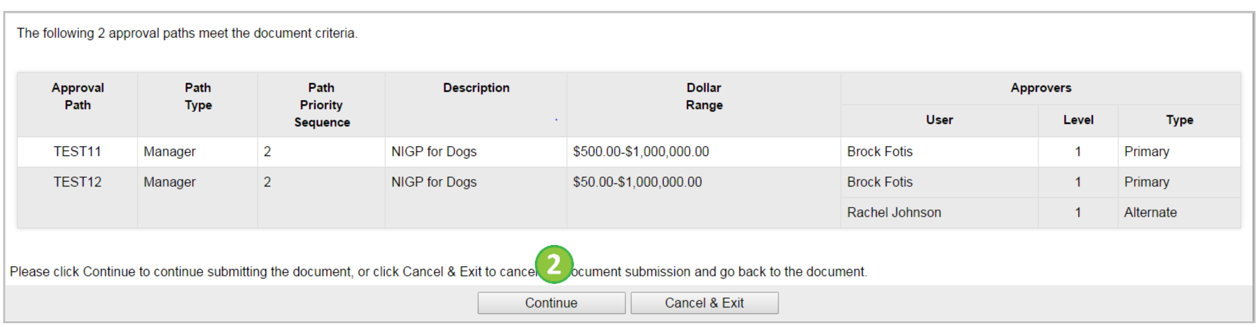
Change Order Approval

If there is an approval path associated with this document, the user will see the approvers and the status on the summary page.

1. Click **Submit for approval**



2. Click **Continue** to send approver email to approve

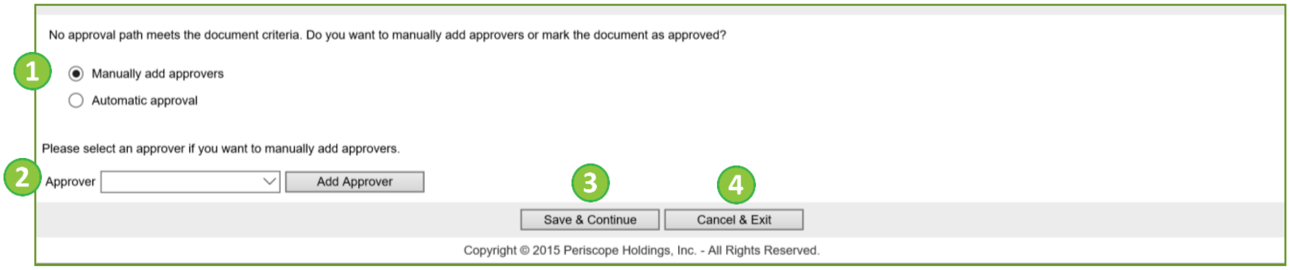


The sequence number is the order in which the approver can approve the document.

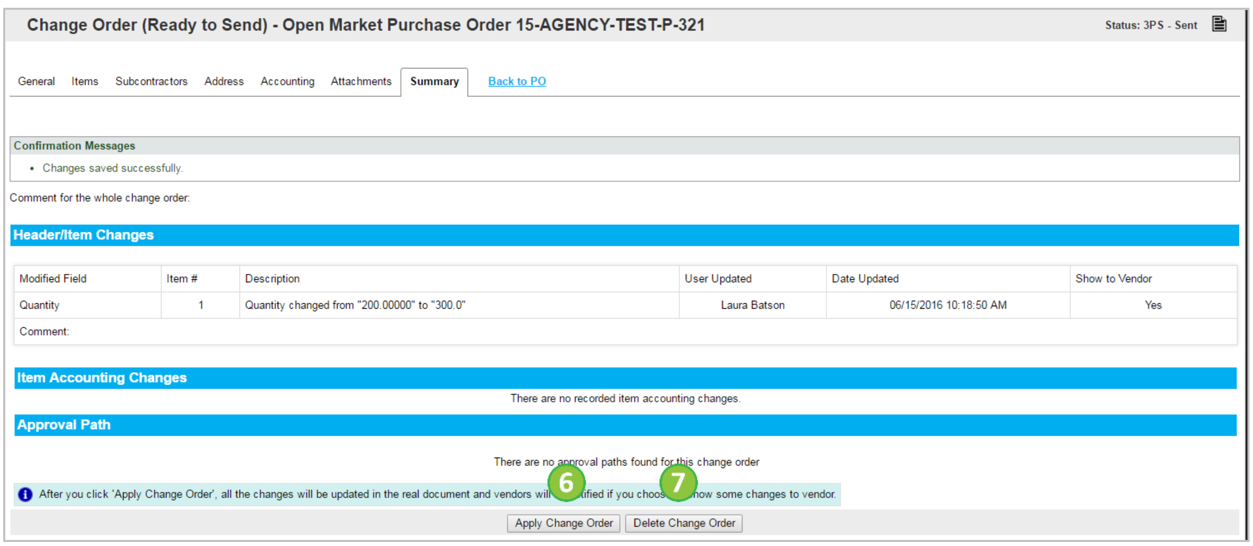
When there is no approval path configured, the user is prompted to select:

- **Automatic Approval** – This option is visible when there are no configured approval paths on the document.
- **Manually Add Approvers** – Requires the user to choose from a drop down list with individuals designated as approvers. The user selects an individual; clicks add approver and then save the approval (see example below).

1. Select **Manually add approvers** to add additional approvers
2. Select **Approvers** from drop-down list and click **Add Approver**
3. Click **Save & Continue** to continue
4. Click **Cancel & Exit** to exit



5. Click **Apply Change Order** to apply to PO
6. Click **Delete Change Order** to delete CO



You must apply the Change Order after it is approved or the PO will not reflect the changes.

Appendix A: Unit of Measure Descriptions

BidBuy UOM	Unit of Measure Description	BidBuy UOM	Unit of Measure Description
ACR	Acre	M	Meter
AU	Activity Unit	MI	Mile
BAG	Bag	ML	Milliliter
BAR	Bar	MM	Millimeter
BT	Bottle	MON	Month
CAN	Canister	PRS	Person
CAR	Carton	OZ	Ounce
CV	Case	PAL	Pallet
CM	Centimeter	%	Percentage
CRT	Crate	PC	Piece
CCM	Cubic centimeter	PT	Pint
FT3	Cubic Foot	QT	Quart
"3	Cubic Inch	S	Second
YD3	Cubic Yard	FT2	Square foot
DAY	Days	"2	Square inch
DZ	Dozen	YD2	Square Yard
DR	Drum	TS	Thousands
EA	Each	GAL	US Gallon
FOZ	Fluid Once	LB	US Pound
FT	Foot	TON	Ton
G	Gram	WK	Week
GRO	Gross	YD	Yard
HR	Hour	YR	Year
"	Inch		
KG	Kilogram		
KM	Kilometer		
L	Liter		

Appendix B: Forms By Process

Procurement Document | **Procurement Method**

						IFB	RFP	RFI Lse	Emr/ Ext	Sol Src	St Use	Lse/ Conc	QBS	RFI	Sml	Dem Req	Ord Off Mast	Chg Ord	Rnw
BidBuy Document	**Owner**	**Document Name**	**Type**	**Location**	**Show Y/N**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**13**	**14**
Requisition	CPO-GS/CMS	Cloud Computing Check Sheet	Attach	https://www.illinois.gov/cpo/general/Documents/20140812%20Open%20Operating%20Standards%20Act%20-%20Cloud%20Checklist%20.pdf	N	X	X		X	X				X	X				
Requisition	CMS	IT Governance	Attach	http://www.illinois.gov/bccs/services/governance/Pages/default.aspx	N	X	X			X									
Requisition	CMS	New Furniture Purchase Form (Surplus Waiver)	Attach	https://cms.partner.illinois.gov/iopr/Forms/Documents/New%20furniture%20purchase%20form.pdf	N	X	X		X	X	X				X		X	X	X
Requisition	CMS	Non-Usage Fleet Request	Form	BidBuy	N	X	X		X	X							X		
Requisition	CMS	Service Procurement and Contracting Checklist	Attach	https://cms.partner.illinois.gov/iopr/Forms/Documents/Labor%20Relations%20Checklist%20March%202014.pdf	N	X	X		X	X	X		X		X		X	X	X
Requisition	PPB	Sole Source Form (part 1)	PPB Doc	http://www.illinois.gov/ppb/Documents/SSJF%20140301%20V5.1%20for%20Dist.docx	Y					X									
Requisition	CMS	Space Req Form	Attach	CMS	N			X											
Requisition	CMS	State Use Committee Approval Form	Attach	CMS	N						X								
Requisition	CMS	Usage Fleet Request	Form	BidBuy	N	X	X		X	X							X		
Bid	CPO-GS	(Solicitation) IFB	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X													
Bid	CPO-GS	(Solicitation) P & A	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y		X												
Bid	CPO-GS	(Solicitation) QBS	Attach		Y								X						
Bid	CPO-GS	(Solicitation) RFP	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx/general/SiteAssets/Pages/SolicitationandContractTemplates/RFP%20Template%20V.18.1.docx	Y		X												
Bid	CDB	255 Submittal Form	Attach	http://www.illinois.gov/cdb/business/library/Documents/255%20FORM.pdf	Y								X						
Bid	Agency	Agency Vet Form	Attach	Agency	N	X	X						x						

Bid	CMS	BEP Exemption Decision Memo	Attach	https://cms.partner.illinois.gov/iopr/PR/ProcurementResourcesDocuments/Decision%20Memo_BEP%20Subcontracting.doc	N	X	X						X						
Bid	CMS	BEP Subcontract Goal Setting	Attach	https://cms.partner.illinois.gov/iopr/PR/BEPGoalSetting/NEW%20CMS%20Goal%20Setting%20Worksheet%20revised%2004-14.xlsx	N	X	X						X						
Bid	CPO-GS	BEP Utilization Plan	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X					X	X						
Bid	CPO-GS	Change Order Justification	Form	BidBuy	N													X	
Bid		Emergency Affidavit	Attach		Y				X										
Bid	CPO-GS	Emergency Extension Justification/Hearing Notice	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y				X										
Bid	CPO-GS	Forms A	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X		X	X	X	X	X		X			X	X
Bid	CPO-GS	Forms B	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X		X	X	X	X	X		X			X	X
Bid	CPO-GS	ICI Waiver	Form	BidBuy	N	X	X			X					X				
Bid	CPO-GS	Letter of Intent BEP - CMS	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X						X			X			
Bid	CPO-GS	Notice of Award/Justification	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X					X	X		X				X
Bid	CPO-GS	QBS Rank Order Form	Form	BidBuy	Y								X						
Bid	PPB	Renewal Questions for over $250,000 (PPB) Form	Attach	http://www.illinois.gov/ppb/Documents/ExtOrRen250_110810.pdf	Y														X
Bid	CPO-GS	Small Business Set Aside Waiver	Form	BidBuy	N	X	X		X	X	X	X			X	X			
Bid	PPB	Sole Source Form (part 2)	PPB Doc	http://www.illinois.gov/ppb/Documents/SSJF%20140301%20V6.1%20for%20Dist.docx	Y					X									
Bid	CPO-GS	Sole Source Hearing Notification	Attach		Y					X									
Bid	CPO-GS	Standard Certifications (Terms and Conditions)	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X		X	X	X	X	X		X				
Bid	Agency	Supplemental Terms and Conditions	Attach	Agency	Y	X	X		X	X	X	X	X		X				X

Bid Tabulation & Award	CMS	BEP Waiver (if needed due to good faith effort)	Attach		N	X	X						X						
Bid Tabulation & Award	CPO-GS	Non-Responsive Vendor Determination	Form	BidBuy	N	X	X					X	X		X				
Bid Tabulation & Award	CPO-GS	Procurement File Checklist	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X												X
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Emergency	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N				X										
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Order Against Master	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N												X		
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Small Purchase	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N										X				
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Sole Source	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N					X									
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Solicitations	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X					X	X			X			
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - State Use	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N						X								
Bid Tabulation & Award	CPO-GS	Responsiveness Review Checklists - IFB	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X													
Bid Tabulation & Award	CPO-GS	Responsiveness Review Checklists - RFP	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N		X												
Bid Tabulation & Award	CPO-GS	Scoring Justification	Attach		N		X			X			X						
Purchase Order	CPO-GS	BOA Orders Against Master	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx/general/Pages/DoingBusinesswithStateAgencies.aspx	N												X		
Purchase Order	CPO-GS	BOA Over 50,000	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X		X	X	X	X	X		X	X			
Purchase Order	CPO-GS	BOA Under 50,000	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N										X				
Purchase Order	CPO-GS	Continuing Disclosure - Change	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N													X	X
Purchase Order	CPO-GS	Continuing Disclosure - No Change	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N													X	X
Purchase Order	CPO-GS	Contract Renewal	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N														X

Purchase Order	CPO-GS	Emergency Extension Hearing Determination	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y				X										
Purchase Order	Agency	3-Signature Form	Attach	Agency	N	X	X		X	X	X		X			X	X	X	X
Purchase Order	CPO-GS	Financial Disclosures & Conflict Of Interest	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X		X	X	X	X	X		X		X	X	X
Purchase Order	DOL	Prevailing Wage Certificate	Attach	http://www.illinois.gov/idol/forms/Documents/Prevailing%20Wage%20Certification%20Form.pdf	N	X	X	X	X	X		X	X	X				X	X
Purchase Order	CPO-GS	Stand Alone Contract	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X	X	X	X	X	X	X		X				X
Purchase Order	CPO-GS	Standard Amendment to Vendor Form	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X	X	X	X	X	X	X	X	X	X	X	X	X

Appendix C: Custom Columns

Appendix C - Custom Columns

Requisition

Column Label*	Column Description	Document Tab
Agency Reference Number	Used for reporting/tracking; enter any applicable Agency-generated reference number	General
Special Procurement Type: If any yes, please complete and attach the applicable Form or Attachment	Select as applicable	General
Link to Original Contract	Allows user to establish a hyperlink to another BidBuy document using an Advanced Search feature	General
Skip Transaction (If yes, transaction is NOT sent to AIS)	AIS Agencies Only	General
Additional NIGP Code	Use to identify additional codes for the BP user to notify vendors on the Bid of the opportunity	Items
Will Federal Funds be used?	Select 'Yes' if Federal Funds will be used	Accounting
If yes, please provide the CFDA#.	Appears when 'Will Fed Funds be used?' is marked 'Yes'	Accounting
Will a Grant Funding Source be used?	Select 'Yes' if Grant Funding will be used	Accounting

BID

SPO Name	Enter SPO name	Bid
Agency Reference Number	Used for reporting/tracking; enter any applicable Agency-generated reference number	Bid
Special Procurement Rationale	Select as applicable	Bid

Emergency Rationale	Appears when 'Special Procurement Rationale' is set to 'Emergency'. Enter narrative to provide justification for using this special procurement method	Bid
Sole Source Rationale	Appears when 'Special Procurement Rationale' is set to 'Sole Source'. Enter narrative to provide justification for using this special procurement method	Bid
Has the approved State Use Request Form and Authorization Letter been attached?	Appears when 'Special Procurement Rationale' is set to 'State Use'. Indicate whether applicable files/forms have been attached	Bid
Brand Name	Used for reporting/tracking; mark whether specifications require a Brand Name item or service	Bid
Is this subject to Small Business Set Aside?	Used for reporting/tracking; mark whether this procurement meets the definition of one of the 673 mandated NIGP Code categories and/or dollar threshold that requires soliciting from qualified, registered SBSP vendors	Bid
Are you utilizing an active, registered Small Business Set Aside Vendor?	Appears when 'Is this subject to Small Busines Set Aside?' is marked 'Yes'. Indicate whether a registered SBSP vendor will be solicited	Bid
Did you complete and attach the Small Business Set Aside Waiver form?	Appears when 'Are you utilizing an active, registered Small Business Set Aside Vendor?' is marked 'No'. Indicate whether a Small Business Set Aside Waiver has been completed and attached.	Bid
Potential BEP/VBP Participation Goal? Only if estimated amount is >/= $250,000	Used for tracking/reporting purposes; mark whether specifications include BEP/VBP participation goals	Bid
Link to Original Contract (for a Renewal or Change Order)	Allows user to establish a hyperlink to another BidBuy document using an Advanced Search feature	Bid
Original Bid Number (for a Renewal or Change Order)	Allows user to identify an original Bid Number, as applicable	Bid
Original Reference Bid Post Date (for a Renewal or Change Order)	Allows user to identify the date the original Bid was posted, as applicable	Bid
Additional NIGP Code	Use to identify additional codes for the BP user to notify vendors on the Bid of the opportunity	Bid
Will Federal Funds be used?	Select 'Yes' if Federal Funds will be used	Bid

If yes, please provide the CFDA#.	Appears when 'Will Fed Funds be used?' is marked 'Yes'	Bid
Will a Grant Funding Source be used?	Select 'Yes' if Grant Funding will be used	Bid

Purchase Order

Agency Reference Number	Used for reporting/tracking; enter any applicable Agency-generated reference number	General
Original Contract No.	Needed for novation and assignments. This custom column is required anytime the original contract no. is needed. (SAMS or AIS)	General
Bulletin Reference Number		General
Publication Date		General
Special Procurement Type	Select as applicable	General
Emergency Affidavit Date		General
Is this subject to Small Business Set Aside?	Used for reporting/tracking; mark whether this procurement meets the definition of one of the 673 mandated NIGP Code categories and/or dollar threshold that requires soliciting from qualified, registered SBSP vendors	General
Are you utilizing an active, registered Small Business Set Aside Vendor?	Appears when 'Is this subject to Small Busines Set Aside?' is marked 'Yes'. Indicate whether a registered SBSP vendor will be solicited	General
Did you complete and attach the Small Business Set Aside Waiver form?	Appears when 'Are you utilizing an active, registered Small Business Set Aside Vendor?' is marked 'No'. Indicate whether a Small Business Set Aside Waiver has been completed and attached.	General
Are there any items on this PO on the current CPO Approved ICI List?		General
Has the ICI Preference Waiver been attached?		General
Actual Contract Begin Date		General
Actual Contract End Date		General
Date Contract Executed	n/a	General

Number of Renewals (number of times you can renew)	n/a	General
Number of Renewal Terms (number of units in one renewal)	n/a	General
Renewal Term Units (renewal indicator; ex months, years, etc)	n/a	General
Next Renewal Start Date		General
Fiscal Year of Obligation	n/a	General
Transaction Code-Prefix (first 2 digits)	AIS Agencies Only	General
Transaction Code-Suffix (last 2 digits)	AIS Agencies Only	General
Master Contract?		General
Master Contract?	AIS Agencies Only	General
Subcontractor Utilization		General
Skip Transaction (If yes, transaction is not sent to AIS)	AIS Agencies Only	General
Original Contract No (Novation/Assignment only)	n/a	General
Subcontractor Disclosed?		General
Travel Indicator		General
Travel Amount		General
Fixed Price?		General
Advance Payment?		General
Incoterm Key		General
Usage % Alert	Please enter the whole percentage, such as 10 for 10%, in which you would like to receive an alert regarding the usage of this contract.	General
Validity Alert (Days)	To receive an alert regarding the number of remaining contract days, please enter a whole number days.	General
Additional NIGP Code	Use to identify additional codes for the BP user to notify vendors on the Bid of the opportunity	Items

Fixed/Variable	AIS Agencies Only	Item
SAP Material Master Number	n/a	Item
Will Federal Funds be used?	Select 'Yes' if Federal Funds will be used	Accounting
If yes, please provide the CFDA#.	Appears when 'Will Fed Funds be used?' is marked 'Yes'	Accounting
Will a Grant Funding Source be used?	Select 'Yes' if Grant Funding will be used	Accounting

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